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 , 2010, and ending , 20

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: UW MCCURDY ARTICLE 2ND CHAR TR

A Employer identification number: 13-6216017

Number and street (or P O box number if mail is not delivered to street address): P O BOX 1802

Room/suite:

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

City or town, state, and ZIP code: PROVIDENCE, RI 02901-1802

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)* ▶ $ 19,818,816.

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)	49,920.			
	2	Check ▶ ☒ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	597,674.	585,950.		STMT 1
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	98,512.			
	b	Gross sales price for all assets on line 6a 1,625,377.				
	7	Capital gain net income (from Part IV, line 2)		98,512.		
	8	Net short-term capital gain				
	9	Income modifications				
	10 a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)	6,531.	7,438.		STMT 4
	12	**Total.** Add lines 1 through 11	752,637.	691,900.		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	134,517.	80,710.		53,807.
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule) STMT 5	1,533.	1,533.	NONE	NONE
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see page 14 of the instructions) STMT 6	12,195.	4,295.		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule) STMT 7	790.	16,965.		790.
	24	**Total operating and administrative expenses.** Add lines 13 through 23	149,035.	103,503.	NONE	54,597.
	25	Contributions, gifts, grants paid	860,964.			860,964.
	26	**Total expenses and disbursements** Add lines 24 and 25	1,009,999.	103,503.	NONE	915,561.
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	-257,362.			
	b	**Net investment income** (if negative, enter -0-)		588,397.		
	c	**Adjusted net income** (if negative, enter -0-)				

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For Paperwork Reduction Act Notice, see page 30 of the instructions. JSA Form **990-PF** (2010)

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Part II Balance Sheets

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

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing	NONE	NONE	
	2	Savings and temporary cash investments	459,402.	464,607.	464,607.
	3	Accounts receivable ▶			
		Less: allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ *		* NONE	
		Less: allowance for doubtful accounts ▶	NONE	NONE	NONE
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10 a	Investments - U S and state government obligations (attach schedule)	970,066.	677,269.	678,845.
	b	Investments - corporate stock (attach schedule)	11,768,830.	13,118,015.	16,640,358.
	c	Investments - corporate bonds (attach schedule)	2,759,628.	1,535,713.	1,626,514.
	11	Investments - land, buildings, and equipment basis ▶ NONE			
		Less accumulated depreciation (attach schedule) ▶	NONE	NONE	
	12	Investments - mortgage loans	NONE	NONE	
	13	Investments - other (attach schedule)	804,125.	397,052.	408,492.
	14	Land, buildings, and equipment. basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)	NONE	NONE	NONE
	16	**Total assets** (to be completed by all filers - see the instructions. Also, see page 1, item I)	16,762,051.	16,192,656.	19,818,816.
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)			
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here** ▶ ☐ **and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ ☒			
	27	Capital stock, trust principal, or current funds	16,762,051.	16,192,656.	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	NONE	NONE	
	30	**Total net assets or fund balances** (see page 17 of the instructions)	16,762,051.	16,192,656.	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	16,762,051.	16,192,656.	

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	16,762,051.
2	Enter amount from Part I, line 27a	2	-257,362.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	16,504,689.
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 8	5	312,033.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	16,192,656.

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Part IV Capital Gains and Losses for Tax on Investment Income

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

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

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

	(i) F M.V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col. (h) gain minus col (k), but not less than -0-) or Losses (from col. (h))
a				
b				
c				
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 }	2	98,512.
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	692,350.	17,001,431.	0.04072304267
2008	930,966.	19,741,189.	0.04715855767
2007			
2006			
2005			

2	Total of line 1, column (d)	2	0.08788160034
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	0.04394080017
4	Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	18,588,891.
5	Multiply line 4 by line 3	5	816,811.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	5,884.
7	Add lines 5 and 6	7	822,695.
8	Enter qualifying distributions from Part XII, line 4	8	915,561.

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.

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 . . . Date of ruling or determination letter ______________ (attach copy of ruling letter if necessary - see instructions)				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☒ and enter 1% of Part I, line 27b			1	5,884.
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b).				
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			2	
3	Add lines 1 and 2			3	5,884.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			4	NONE
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-			5	5,884.
6	Credits/Payments:				
a	2010 estimated tax payments and 2009 overpayment credited to 2010	6a	7,900.		
b	Exempt foreign organizations-tax withheld at source	6b	NONE		
c	Tax paid with application for extension of time to file (Form 8868)	6c	NONE		
d	Backup withholding erroneously withheld	6d			
7	Total credits and payments. Add lines 6a through 6d			7	7,900.
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached			8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	2,016.
11	Enter the amount of line 10 to be: **Credited to 2011 estimated tax** ▶ 2,016. **Refunded** ▶			11	

Part VII-A Statements Regarding Activities

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

Part VII-A Statements Regarding Activities *(continued)*

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

Website address ▶ N/A

14 The books are in care of ▶ PRIVATE BANK TAX SERVICES Telephone no ▶ (401)278-6825

Located at ▶ P.O. BOX 1802, PROVIDENCE, RI ZIP + 4 ▶ 02901-1802

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** - Check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ 15

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

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

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

			Yes	No
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)?	1b		X
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2010?	1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? ☐ Yes ☒ No If "Yes," list the years ▶ ______, ______, ______, ______			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see page 22 of the instructions.)	2b		X
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ ______, ______, ______, ______			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2010 as a result of (**1**) any purchase by the foundation or disqualified persons after May 26, 1969; (**2**) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (**3**) the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2010.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2010?	4b		X

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)? **5b**

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

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

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

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . . . **6b** Yes: — No: X

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? . . ☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? **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
SEE STATEMENT 10		134,517.	-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		NONE	NONE	NONE

Total number of other employees paid over $50,000 . . . . ▶ NONE

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

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

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

Part IX-A **Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 NONE	
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 NONE	
2	
All other program-related investments See page 24 of the instructions 3 NONE	
Total. Add lines 1 through 3 ▶	

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	18,024,239.
b	Average of monthly cash balances	1b	847,732.
c	Fair market value of all other assets (see page 25 of the instructions)	1c	NONE
d	**Total** (add lines 1a, b, and c)	1d	18,871,971.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	NONE
3	Subtract line 2 from line 1d	3	18,871,971.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	283,080.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	18,588,891.
6	**Minimum investment return.** Enter 5% of line 5	6	929,445.

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	929,445.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	5,884.		
b	Income tax for 2010. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	5,884.
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	923,561.
4	Recoveries of amounts treated as qualifying distributions			4	NONE
5	Add lines 3 and 4			5	923,561.
6	Deduction from distributable amount (see page 25 of the instructions)			6	NONE
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	923,561.

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	915,561.
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	NONE
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)	3b	NONE
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	915,561.
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	5,884.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	909,677.

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					923,561.
2 Undistributed income, if any, as of the end of 2010					
a Enter amount for 2009 only				197,846.	
b Total for prior years: 20_____,20_____,20_____			NONE		
3 Excess distributions carryover, if any, to 2010:					
a From 2005	NONE				
b From 2006	NONE				
c From 2007	NONE				
d From 2008	NONE				
e From 2009	NONE				
f **Total** of lines 3a through e		NONE			
4 Qualifying distributions for 2010 from Part XII, line 4: ▶ $ 915,561.					
a Applied to 2009, but not more than line 2a				197,846.	
b Applied to undistributed income of prior years (Election required - see page 26 of the instructions)			NONE		
c Treated as distributions out of corpus (Election required - see page 26 of the instructions)		NONE			
d Applied to 2010 distributable amount					717,715.
e Remaining amount distributed out of corpus		NONE			
5 Excess distributions carryover applied to 2010 *(If an amount appears in column (d), the same amount must be shown in column (a).)*		NONE			NONE
6 **Enter the net total of each column as indicated below:**					
a Corpus Add lines 3f, 4c, and 4e. Subtract line 5		NONE			
b Prior years' undistributed income. Subtract line 4b from line 2b			NONE		
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			NONE		
d Subtract line 6c from line 6b. Taxable amount - see page 27 of the instructions			NONE		
e Undistributed income for 2009 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions					
f Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011					205,846.
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)		NONE			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7 (see page 27 of the instructions)		NONE			
9 **Excess distributions carryover to 2011.** Subtract lines 7 and 8 from line 6a		NONE			
10 Analysis of line 9					
a Excess from 2006	NONE				
b Excess from 2007	NONE				
c Excess from 2008	NONE				
d Excess from 2009	NONE				
e Excess from 2010	NONE				

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9) NOT APPLICABLE

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

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

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

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

1 **Information Regarding Foundation Managers:**

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

N/A

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

N/A

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

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

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

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

c Any submission deadlines:

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

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
SEE STATEMENT 12				
Total . . . . . . ▶ 3a				860,964.
b *Approved for future payment*				
Total . . . . . . ▶ 3b				

Part XVI-A Analysis of Income-Producing Activities

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					
4 Dividends and interest from securities			14	597,674.	
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	98,512.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue: a					
b EXCISE TAX REFUND			01	6,531.	
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)				702,717.	

13 **Total.** Add line 12, columns (b), (d), and (e) . . . . . 13 702,717.

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

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See page 29 of the instructions.)
	NOT APPLICABLE

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

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

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

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

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.

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

Sign Here

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

Signature of officer or trustee

Date 09/13/2011

Title SVP Tax

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN

Firm's name ▶

Firm's EIN ▶

Firm's address ▶

Phone no

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj. basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		TOTAL SHORT-TERM COMMON TRUST FUND AND PARTNERSHIP, S CORPORATION, AND OTHER ESTATES OR TRUST GAIN OR LOSS					2,194.	
		TOTAL SHORT-TERM GAIN FROM FORM 6781					-24.	
		TOTAL LONG-TERM CAPITAL GAIN DIVIDENDS					20,602.	
		TOTAL LONG-TERM COMMON TRUST FUND AND PARTNERSHIP, S CORPORATION, AND OTHER ESTATES OR TRUST GAIN OR LOSS					42,582.	
		TOTAL LONG-TERM GAIN FROM FORM 6781					-36.	
		50000. GOLDMAN SACHS GROUP INC SR NT PROPERTY TYPE: SECURITIES					08/23/2007	03/22/2010
53,657.00		49,084.00					4,573.00	
		50000. GOLDMAN SACHS GROUP INC SR NT PROPERTY TYPE: SECURITIES					09/12/2007	03/22/2010
53,657.00		49,466.00					4,191.00	
		50000. GOLDMAN SACHS GROUP INC SR NT PROPERTY TYPE: SECURITIES					09/11/2007	03/22/2010
53,657.00		49,484.00					4,173.00	
		80000. GOLDMAN SACHS GROUP INC SR NT PROPERTY TYPE: SECURITIES					08/30/2006	03/22/2010
85,850.00		78,823.00					7,027.00	
		190000. GOLDMAN SACHS GROUP INC SR NT PROPERTY TYPE: SECURITIES					05/14/2008	03/22/2010
196,259.00		192,673.00					3,586.00	
		300000. FEDERAL HOME LN BKS CONS BD PROPERTY TYPE: SECURITIES					11/12/2008	04/30/2010
300,000.00		299,271.00					729.00	
		200000. WAL-MART STORES INC NT PROPERTY TYPE: SECURITIES					12/26/2007	07/01/2010
200,000.00		199,780.00					220.00	

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		100000. CISCO SYS INC NT					11/25/2008	07/12/2010
		PROPERTY TYPE: SECURITIES						
114,864.00		97,413.00					17,451.00	
		.767 WEYERHAEUSER CO COM					09/01/2010	09/09/2010
		PROPERTY TYPE: SECURITIES						
13.00		12.00					1.00	
		100000. CISCO SYS INC NT					01/14/2009	09/17/2010
		PROPERTY TYPE: SECURITIES						
102,042.00		105,228.00					-3,186.00	
		200000. SBC COMMUNICATIONS INC NT					01/13/2009	11/15/2010
		PROPERTY TYPE: SECURITIES						
200,000.00		205,464.00					-5,464.00	
		100000. CATERPILLAR FINL SVCS CORP MTN					02/07/2006	12/01/2010
		PROPERTY TYPE: SECURITIES						
100,000.00		100,107.00					-107.00	
		100000. CATERPILLAR FINL SVCS CORP MTN					08/14/2006	12/01/2010
		PROPERTY TYPE: SECURITIES						
100,000.00		100,000.00						

TOTAL GAIN(LOSS)		....					98,512.	
							==========	

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ **Attach to Form 990, 990-EZ, or 990-PF.**

OMB No 1545-0047

2010

Name of the organization

UW MCCURDY ARTICLE 2ND CHAR TR

Employer identification number

13-6216017

Organization type (check one):

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☐ 501(c)(3) exempt private foundation
	☒ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

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

General Rule

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

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than $1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of $5,000 or more during the year . . . . ▶ $ ____________

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization	Employer identification number
UW MCCURDY ARTICLE 2ND CHAR TR	13-6216017

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	UW MATILDA G MC CURDY J W GIBSON P.O. BOX 1802 PROVIDENCE, RI 02901-1802	$ 22,085.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
2	MATILDA G MC CURDY SG FASSNACHT P.O. BOX 1802 PROVIDENCE, RI 02901-1802	$ 27,835.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

Form **6781**

Department of the Treasury
Internal Revenue Service

Gains and Losses From Section 1256 Contracts and Straddles

▶ **Attach to your tax return.**

OMB No 1545-0644

2010

Attachment Sequence No **82**

Name(s) shown on tax return: UW MCCURDY ARTICLE 2ND CHAR TR

Identifying number: 13-6216017

Check all applicable boxes (see instructions).
A ☐ Mixed straddle election
B ☐ Straddle-by-straddle identification election
C ☐ Mixed straddle account election
D ☐ Net section 1256 contracts loss election

Part I Section 1256 Contracts Marked to Market

	(a) Identification of account	(b) (Loss)	(c) Gain
1	SEE STATEMENT 13	60.	

2	Add the amounts on line 1 in columns (b) and (c)	2	(60.)
3	Net gain or (loss) Combine line 2, columns (b) and (c)	3	-60.
4	Form 1099-B adjustments. See instructions and attach schedule	4	
5	Combine lines 3 and 4	5	-60.
	Note: *If line 5 shows a net gain, skip line 6 and enter the gain on line 7. Partnerships and S corporations, see instructions*		
6	If you have a net section 1256 contracts loss and checked box D above, enter the amount of loss to be carried back. Enter the loss as a positive number	6	
7	Combine lines 5 and 6	7	-60.
8	**Short-term capital gain or (loss).** Multiply line 7 by 40% (.40) Enter here and include on the appropriate line of Schedule D (see instructions)	8	-24.
9	**Long-term capital gain or (loss).** Multiply line 7 by 60% (.60) Enter here and include on the appropriate line of Schedule D (see instructions)	9	-36.

Part II Gains and Losses From Straddles. Attach a separate schedule listing each straddle and its components.

Section A - Losses From Straddles

	(a) Description of property	(b) Date entered into or acquired	(c) Date closed out or sold	(d) Gross sales price	(e) Cost or other basis plus expense of sale	(f) Loss If column (e) is more than (d), enter difference Otherwise, enter -0-	(g) Unrecognized gain on offsetting positions	(h) Recognized loss. If column (f) is more than (g), enter difference Otherwise, enter -0-
10								

11a	Enter the short-term portion of losses from line 10, column (h), here and include on the appropriate line of Schedule D (see instructions)	11a	( )
b	Enter the long-term portion of losses from line 10, column (h), here and include on the appropriate line of Schedule D (see instructions)	11b	( )

Section B - Gains From Straddles

	(a) Description of property	(b) Date entered into or acquired	(c) Date closed out or sold	(d) Gross sales price	(e) Cost or other basis plus expense of sale	(f) Gain. If column (d) is more than (e), enter difference. Otherwise, enter -0-
12						

13a	Enter the short-term portion of gains from line 12, column (f), here and include on the appropriate line of Schedule D (see instructions)	13a	
b	Enter the long-term portion of gains from line 12, column (f), here and include on the appropriate line of Schedule D (see instructions)	13b	

Part III Unrecognized Gains From Positions Held on Last Day of Tax Year. Memo Entry Only (see instructions)

	(a) Description of property	(b) Date acquired	(c) Fair market value on last business day of tax year	(d) Cost or other basis as adjusted	(e) Unrecognized gain. If column (c) is more than (d), enter difference Otherwise, enter -0-
14					

For Paperwork Reduction Act Notice, see page 4.

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
ABBOTT LABORATORIES	5,160.	5,160.
AMERIPRISE FINANCIAL INC	710.	710.
APACHE CORPORATION	1,800.	1,800.
BAXTER INTERNATIONAL INC	2,900.	2,900.
BHP BILLITON LIMITED ADR	1,740.	1,740.
BOEING CO SR UNSECD NT	5,000.	5,000.
BOFA GOVERNMENT RESERVES TRUST CLASS - F	2.	2.
BRISTOL MYERS SQUIBB CO COM	5,120.	5,120.
CABOT OIL & GAS CORP CL A	264.	264.
CATERPILLAR INCORPORATED	6,880.	6,880.
CATERPILLAR FINL SVCS CORP MTN	11,691.	11,691.
CHEVRON CORP SR NT	6,900.	6,900.
CISCO SYS INC NT	5,688.	5,688.
CISCO SYS INC NT	5,538.	5,538.
COCA COLA CO COM	8,800.	8,800.
COSTCO WHOLESALE CORP	954.	954.
DANONE SPONSORED ADR	1,779.	1,779.
DEERE JOHN CAP CORP MTN	5,250.	5,250.
DEVON ENERGY CORPORATION	2,112.	2,112.
DISNEY WALT CO	2,800.	2,800.
DUKE ENERGY CORP NEW COM	7,760.	7,760.
ECOLAB INCORPORATED	2,790.	2,790.
EMERSON ELEC CO	1,350.	1,350.
EXXON MOBIL CORPORATION	5,568.	5,568.
FPL GROUP INC COM	1,500.	1,500.
FEDERAL HOME LN BKS CONS BD	3,563.	3,563.
FEDERAL HOME LN BKS CONS BD	4,000.	4,000.
FREEPORT-MCMORAN COPPER & GOLD INC COM	4,750.	4,750.
GENERAL ELEC CAP CORP MTN	4,875.	4,875.
GOLDCORP INC NEW	420.	420.
GOLDMAN SACHS GROUP INC SR NT	7,637.	7,637.
GOLDMAN SACHS GROUP INC SR NT	7,097.	7,097.

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
HEINZ H J CO	5,220.	5,220.
HEWLETT PACKARD CO COM	1,600.	1,600.
HEWLETT PACKARD CO NT	6,125.	6,125.
HONEYWELL INTERNATIONAL INC	2,420.	2,420.
ITT INDUSTRIES INC	3,369.	3,369.
INTEL CORPORATION	7,560.	7,560.
INTERMEDIATE TERM TAXABLE BOND FD	69,381.	69,095.
INTERNATIONAL BUSINESS MACHS	7,500.	7,500.
ISHARES INC MSCI BRAZIL FREE INDEX FUND	11,417.	11,417.
ISHARES FTSE XINHAU HK CHINA 25 INDEX	11,592.	11,592.
ISHARES MSCI EMERGING MKTS INDEX FUND	7,553.	7,553.
ISHARES S&P SMALLCAP 600 INDEX FUND	6,634.	6,634.
J P MORGAN CHASE & CO COM	700.	700.
JPMORGAN CHASE & CO GLOBAL SUB HLDG CO N	10,250.	10,250.
JOHNSON & JOHNSON	4,220.	4,220.
JPMORGAN CHASE CAP XXVI CAP SECS VAR SER	30,000.	30,000.
LEUCADIA NATIONAL CORP	1,250.	1,250.
LOWES COMPANIES INCORPORATED	4,000.	4,000.
MCDONALDS CORP	6,780.	6,780.
MERCK & CO INC SR UNSECD NT	4,000.	4,000.
MICROSOFT CORPORATION	7,150.	7,150.
MICROCHIP TECHNOLOGY INC COM	10,290.	278.
MONSANTO CO NEW COM	1,720.	1,720.
MORGAN STANLEY FDIC GTD NT	2,000.	2,000.
NEXTERA ENERGY INC COM	4,500.	4,500.
ORACLE SYS CORP	2,000.	2,000.
PEPSICO INC SR NT	5,150.	5,150.
PRICE T ROWE GROUP INC COM	2,700.	2,700.
PROCTER & GAMBLE CO COM	6,599.	6,599.
PROCTER & GAMBLE CO NT	7,000.	7,000.
RIO TINTO PLC SPONSORED ADR	2,477.	2,477.
SBC COMMUNICATIONS INC NT	10,600.	10,600.
SPDR S&P HOMEBUILDERS ETF	1,680.	1,680.

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
SCHLUMBERGER LIMITED	3,360.	3,360.
SOUTHERN UN CO NEW COM	5,400.	5,400.
SPECTRA ENERGY CORP COM	4,000.	4,000.
STATE STREET CORP	80.	80.
TEVA PHARMACEUTICAL INDS LTD ADR	2,949.	2,949.
UNION PAC CORP COM	2,640.	2,640.
UNITED STATES TREAS NTS INFLATION INDEX	17,466.	17,466.
UNITED STATES TREAS NTS	7,547.	7,547.
VISA INC CL A COM	1,050.	1,050.
WACHOVIA CORP GLOBAL SR MTN	5,500.	5,500.
WAL-MART STORES INC NT	8,250.	8,250.
WELLS FARGO & CO NEW NEW SUB NT	5,125.	5,125.
WEYERHAEUSER CO COM	78,009.	76,583.
LONG TERM TAXABLE BOND FUND FOR TRUSTS	52,242.	52,242.
COVIDIEN LTD PLC COM	1,110.	1,110.
ACE LTD COM	4,224.	4,224.
NOBLE CORP COM	887.	887.
TOTAL	597,674.	585,950.

FORM 990PF, PART I - OTHER INCOME

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
FEDERAL TAX REFUND	6,531.	
UST EXCELSIOR DIRECTIONAL HEDGE FUND OF		10,417.
UST EXCELSIOR VENTURE PARTNER III LLC		-58.
EXCELSIOR ABSOLUTE LIQ TRUST (ACTUAL CAP		-252.
EXCELSIOR ABSOLUTE RETURN LIQUIDATING TR		-2,669.
TOTALS	6,531.	7,438.

FORM 990PF, PART I - ACCOUNTING FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
AUDIT & ACCOUNTING FEES (ALLOC	1,533.	1,533.		
TOTALS	1,533.	1,533.	NONE	NONE

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
FOREIGN TAXES	908.	908.
FEDERAL ESTIMATES - PRINCIPAL	7,900.	
FOREIGN TAXES ON QUALIFIED FOR	2,616.	2,616.
FOREIGN TAXES ON NONQUALIFIED	771.	771.
TOTALS	12,195.	4,295.

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	CHARITABLE PURPOSES
OTHER ALLOCABLE EXPENSE-INCOME	750.		750.
OTHER NON-ALLOCABLE EXPENSE -	40.		40.
DIVIDEND INVESTMENT EXPENSE -		16,965.	
TOTALS	790.	16,965.	790.

FORM 990PF, PART III - OTHER DECREASES IN NET WORTH OR FUND BALANCES

DESCRIPTION	AMOUNT
10 TYE INCOME ADJ	5,800.
ADJ CARRYING VALUE	94,338.
EXCELSIOR ROC	211,895.
TOTAL	312,033.

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-------------------------------------------
STATE(S) WHERE THE FOUNDATION IS REGISTERED
===========================================
     NY
```

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

OFFICER NAME:
BANK OF AMERICA, N.A.
ADDRESS:
ONE BRYANT PARK
NEW YORK, NY 10036
TITLE:
TRUSTEE
AVERAGE HOURS PER WEEK DEVOTED TO POSITION: 40
COMPENSATION .... 134,517.

TOTAL COMPENSATION: 134,517.

FORM 990PF, PART XV, LINE 3 - CONTRIBUTIONS, GIFTS, GRANTS PAID

RECIPIENT NAME:
SAINT LUKES ROOSEVELT
HOSPITAL CENTER
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
RESEARCH & DEVELOPMENT
FOUNDATION STATUS OF RECIPIENT:
PUBLIC
AMOUNT OF GRANT PAID .... 143,494.

RECIPIENT NAME:
CHRIST EPISCOPAL CHURCH
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CHURCH MAINTENANCE
FOUNDATION STATUS OF RECIPIENT:
PUBLIC
AMOUNT OF GRANT PAID .... 143,494.

RECIPIENT NAME:
SAINT JAMES CHURCH
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
CHURCH MAINTENANCE
FOUNDATION STATUS OF RECIPIENT:
PUBLIC
AMOUNT OF GRANT PAID .... 143,494.

RECIPIENT NAME:
EYE BANK FOR SIGHT
RESTORATION
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
RESEARCH & DEVELOPMENT
FOUNDATION STATUS OF RECIPIENT:
PUBLIC
AMOUNT OF GRANT PAID .... 143,494.

FORM 990PF, PART XV, LINE 3 - CONTRIBUTIONS, GIFTS, GRANTS PAID

RECIPIENT NAME:
YALE UNIVERSITY
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
EDUCATION
FOUNDATION STATUS OF RECIPIENT:
PUBLIC
AMOUNT OF GRANT PAID .... 143,494.

RECIPIENT NAME:
UNIVERSITY OF THE SOUTH
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
EDUCATION
FOUNDATION STATUS OF RECIPIENT:
PUBLIC
AMOUNT OF GRANT PAID .... 143,494.

TOTAL GRANTS PAID: 860,964.

FORM 6781, PART I -- SECTION 1256 CONTRACTS MARKED TO MARKET

DESCRIPTION	DATE ACQUIRED	DATE SOLD	GROSS SALES PRICE	COST OR BASIS	LOSS	GAIN
EXCELSIOR MULTI STRATEGY HEDGE FUND		OPEN			60.	
TOTAL GAINS AND LOSSES					60.	

SCHEDULE D
(Form 1041)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

▶Attach to Form 1041, Form 5227, or Form 990-T. See the Instructions for Schedule D (Form 1041) (also for Form 5227 or Form 990-T, if applicable).

OMB No 1545-0092

2010

Name of estate or trust	Employer identification number
UW MCCURDY ARTICLE 2ND CHAR TR	13-6216017

Note: *Form 5227 filers need to complete **only** Parts I and II.*

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

	(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
1a						

b	Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b	1b	1.
2	Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824	2	-24.
3	Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts	3	2,194.
4	Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2009 Capital Loss Carryover Worksheet	4	( )
5	**Net short-term gain or (loss).** Combine lines 1a through 4 in column (f). Enter here and on line 13, column (3) on the back ▶	5	2,171.

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

	(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
6a	LONG-TERM CAPITAL GAIN DIVIDENDS		STMT 1			20,602.

b	Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b	6b	33,193.
7	Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824	7	-36.
8	Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts	8	42,582.
9	Capital gain distributions	9	
10	Gain from Form 4797, Part I	10	
11	Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2009 Capital Loss Carryover Worksheet	11	( )
12	**Net long-term gain or (loss).** Combine lines 6a through 11 in column (f). Enter here and on line 14a, column (3) on the back ▶	12	96,341.

Part III Summary of Parts I and II

Caution: *Read the instructions* ***before*** *completing this part.*

			(1) Beneficiaries' (see instr)	(2) Estate's or trust's	(3) Total
13	**Net short-term gain or (loss)**	13			2,171.
14	**Net long-term gain or (loss):**				
a	Total for year	14a			96,341.
b	Unrecaptured section 1250 gain (see line 18 of the wrksht.)	14b			
c	28% rate gain	14c			
15	**Total net gain or (loss).** Combine lines 13 and 14a ▶	15			98,512.

Note: *If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a). If lines 14a and 15, column (2), are net gains, go to Part V, and* ***do not*** *complete Part IV. If line 15, column (3), is a net loss, complete Part IV and the* ***Capital Loss Carryover Worksheet,*** *as necessary.*

Part IV Capital Loss Limitation

16 Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the **smaller** of:

a The loss on line 15, column (3) **or b** $3,000 .... 16 ( )

Note: *If the loss on line 15, column (3), is more than $3,000,* ***or*** *if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the* ***Capital Loss Carryover Worksheet*** *on page 7 of the instructions to figure your capital loss carryover*

Part V Tax Computation Using Maximum Capital Gains Rates

Form 1041 filers. Complete this part **only** if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), **and** Form 1041, line 22, is more than zero.

Caution: *Skip this part and complete the worksheet on page 8 of the instructions if:*

- *Either line 14b, col. (2) or line 14c, col. (2) is more than zero, or*
- *Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.*

Form 990-T trusts. Complete this part **only** if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, **and** Form 990-T, line 34, is more than zero. Skip this part and complete the worksheet on page 8 of the instructions if either line 14b, col. (2) or line 14c, col. (2) is more than zero.

17	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34)	17	
18	Enter the **smaller** of line 14a or 15 in column (2) but not less than zero	18	
19	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)	19	
20	Add lines 18 and 19	20	
21	If the estate or trust is filing Form 4952, enter the amount from line 4g; otherwise, enter -0- ▶	21	
22	Subtract line 21 from line 20. If zero or less, enter -0-	22	
23	Subtract line 22 from line 17. If zero or less, enter -0-	23	
24	Enter the **smaller** of the amount on line 17 or $2,300	24	
25	Is the amount on line 23 equal to or more than the amount on line 24? ☐ **Yes.** Skip lines 25 and 26; go to line 27 and check the "No" box. ☐ **No.** Enter the amount from line 23	25	
26	Subtract line 25 from line 24	26	
27	Are the amounts on lines 22 and 26 the same? ☐ **Yes.** Skip lines 27 thru 30, go to line 31 ☐ **No.** Enter the **smaller** of line 17 or line 22	27	
28	Enter the amount from line 26 (If line 26 is blank, enter -0-)	28	
29	Subtract line 28 from line 27	29	
30	Multiply line 29 by 15% (.15)	30	
31	Figure the tax on the amount on line 23. Use the 2010 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	31	
32	Add lines 30 and 31	32	
33	Figure the tax on the amount on line 17. Use the 2010 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	33	
34	**Tax on all taxable income.** Enter the **smaller** of line 32 or line 33 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36)	34	

Schedule D (Form 1041) 2010

SCHEDULE D-1
(Form 1041)

Department of the Treasury
Internal Revenue Service

Continuation Sheet for Schedule D (Form 1041)

▶ See instructions for Schedule D (Form 1041).
▶ Attach to Schedule D to list additional transactions for lines 1a and 6a.

OMB No 1545-0092

2010

Name of estate or trust
UW MCCURDY ARTICLE 2ND CHAR TR

Employer identification number
13-6216017

Part I **Short-Term Capital Gains and Losses - Assets Held One Year or Less**

(a) Description of property (Example· 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo., day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) Subtract (e) from (d)
1a .767 WEYERHAEUSER CO COM	09/01/2010	09/09/2010	13.00	12.00	1.00

1b Total. Combine the amounts in column (f). Enter here and on Schedule D, line 1b 1.00

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D-1 (Form 1041) 2010

JSA
0F1221 3 000

Name of estate or trust as shown on Form 1041 Do not enter name and employer identification number if shown on the other side	Employer identification number
UW MCCURDY ARTICLE 2ND CHAR TR	13-6216017

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example: 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) Subtract (e) from (d)
6a 50000. GOLDMAN SACHS GROUP INC SR NT	08/23/2007	03/22/2010	53,657.00	49,084.00	4,573.00
50000. GOLDMAN SACHS GROUP INC SR NT	09/12/2007	03/22/2010	53,657.00	49,466.00	4,191.00
50000. GOLDMAN SACHS GROUP INC SR NT	09/11/2007	03/22/2010	53,657.00	49,484.00	4,173.00
80000. GOLDMAN SACHS GROUP INC SR NT	08/30/2006	03/22/2010	85,850.00	78,823.00	7,027.00
190000. GOLDMAN SACHS GROUP INC SR NT	05/14/2008	03/22/2010	196,259.00	192,673.00	3,586.00
300000. FEDERAL HOME LN BKS CONS BD	11/12/2008	04/30/2010	300,000.00	299,271.00	729.00
200000. WAL-MART STORES INC NT	12/26/2007	07/01/2010	200,000.00	199,780.00	220.00
100000. CISCO SYS INC NT	11/25/2008	07/12/2010	114,864.00	97,413.00	17,451.00
100000. CISCO SYS INC NT	01/14/2009	09/17/2010	102,042.00	105,228.00	-3,186.00
200000. SBC COMMUNICATIONS INC NT	01/13/2009	11/15/2010	200,000.00	205,464.00	-5,464.00
100000. CATERPILLAR FINL SVCS CORP MTN	02/07/2006	12/01/2010	100,000.00	100,107.00	-107.00
100000. CATERPILLAR FINL SVCS CORP MTN	08/14/2006	12/01/2010	100,000.00	100,000.00	

6b Total. Combine the amounts in column (f). Enter here and on Schedule D, line 6b 33,193.00

Schedule D-1 (Form 1041) 2010

FEDERAL CAPITAL GAIN DIVIDENDS

LONG-TERM CAPITAL GAIN DIVIDENDS

15% RATE CAPITAL GAIN DIVIDENDS		
AOL TIME WARNER INC COM	1,060.00	
ENRON CORPORATION	3,742.00	
WEYERHAEUSER CO COM	2,086.00	
XEROX CORPORATION	12,427.00	
QWEST COMMUNICATIONS INTL INC COM	1,287.00	
TOTAL 15% RATE CAPITAL GAIN DIVIDENDS		20,602.00
TOTAL LONG-TERM CAPITAL GAIN DIVIDENDS		20,602.00

GAINS AND LOSSES FROM PASS-THRU ENTITIES

```
NET SHORT-TERM GAIN (LOSS) FROM PARTNERSHIPS, S CORPORATIONS
AND OTHER FIDUCIARIES

  COMMON TRUST FUNDS                                  2,194.00
                                                  ------------
                                                               ------------
TOTAL NET SHORT-TERM GAIN OR LOSS (ROUNDED)                        2,194.00
                                                               ============

NET LONG-TERM GAIN (LOSS) FROM PARTNERSHIPS, S CORPORATIONS
AND OTHER FIDUCIARIES

  COMMON TRUST FUNDS                                 42,582.00
                                                  ------------
                                                               ------------
TOTAL NET LONG-TERM GAIN OR LOSS (ROUNDED)                        42,582.00
                                                               ============
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Bank of America
Merrill Lynch

Portfolio Detail

UW MCCURDY ARTICLE 2ND CHAR TR

Oct 01, 2010 through Dec 31, 2010

Units	Description	CUSIP	Market Value/ Market Price	% of Total	Tax Cost/ Average Unit Cost	Unrealized Gain/Loss	Accrued Income	Estimated Annual Income	Cur Yld/ YTM
Cash/Currency									
Cash Equivalents									
84,127.680	BOFA GOVERNMENT RESERVES TRUST CLASS - FORMERLY COLUMBIA GOVERNMENT RESERVES (Income Investment)	097100556	$84,127.68	0.4%	$84,127.68 1 000	$0.00	$0.00	$0.00	0.0%
380,479.340	BOFA GOVERNMENT RESERVES TRUST CLASS - FORMERLY COLUMBIA GOVERNMENT RESERVES	097100556	380,479 34	1 9	380,479.34 1.000	0 00	0 00	0.00	0 0
	Total Cash Equivalents		**$464,607.02**	**2.3%**	**$464,607.02**	**$0.00**	**$0.00**	**$0.00**	**0.0%**
Total Cash/Currency			**$464,607.02**	**2.3%**	**$464,607.02**	**$0.00**	**$0.00**	**$0.00**	**0.0%**
Equities									
Consumer Discretionary									
8,000.000	DISNEY WALT CO COM DISNEY Ticker: DIS	254687106	$300,080.00 37.510	1 5%	$131,942 64 16.493	$168,137.36	$3,200 00	$3,200 00	1 1%
10,000.000	LOWES COS INC Ticker: LOW	548661107	250,800 00 25 080	1 3	188,406 02 18.841	62,393 98	0 00	4,400 00	1 8
3,000.000	MCDONALDS CORP Ticker: MCD	580135101	230,280.00 76.760	1.2	165,824.89 55.275	64,455.11	0 00	7,320.00	3.2
	Total Consumer Discretionary		**$781,160.00**	**3.9%**	**$486,173.55**	**$294,986.45**	**$3,200.00**	**$14,920.00**	**1.9%**
Consumer Staples									
5,000.000	COCA COLA CO Ticker: KO	191216100	$328,850.00 65 770	1.7%	$222,830 10 44.566	$106,019.90	$0.00	$8,800.00	2.7%
1,200.000	COSTCO WHSL CORP NEW Ticker: COST	22160K105	86,652 00 72 210	0 4	79,363 68 66.136	7,288.32	0 00	984.00	1 1
6,000.000	DANONE SPONSORED ADR FRANCE Ticker: DANOY	23636T100	75,696 00 12 616	0 4	60,346 51 10 058	15,349 49	0 00	1,212 00	1 6

Portfolio Detail

UW MCCURDY ARTICLE 2ND CHAR TR

Oct 01, 2010 through Dec 31, 2010

Units	Description	CUSIP	Market Value/ Market Price	% of Total	Tax Cost/ Average Unit Cost	Unrealized Gain/Loss	Accrued Income	Estimated Annual Income	Cur Yld/ YTM
Equities (cont)									
Consumer Staples (cont)									
3,000.000	HEINZ H J CO Ticker: HNZ	423074103	148,380.00 49.460	0.7	134,820.50 44.940	13,559 50	1,350.00	5,400.00	3.6
3,500.000	PROCTER & GAMBLE CO Ticker: PG	742718109	225,155 00 64 330	1.1	129,980 23 37.137	95,174 77	0.00	6,744 50	3.0
	Total Consumer Staples		**$864,733.00**	**4.4%**	**$627,341.02**	**$237,391.98**	**$1,350.00**	**$23,140.50**	**2.7%**
Energy									
3,000.000	APACHE CORP Ticker. APA	037411105	$357,690.00 119.230	1.8%	$228,685 16 76.228	$129,004 84	$0 00	$1,800 00	0.5%
2,200.000	CABOT OIL & GAS CORP Ticker: COG	127097103	83,270.00 37.850	0.4	75,280 14 34.218	7,989.86	0 00	264 00	0 3
3,300.000	DEVON ENERGY CORP NEW Ticker: DVN	25179M103	259,083 00 78 510	1 3	208,314 35 63 126	50,768.65	0 00	2,112 00	0 8
3,200.000	EXXON MOBIL CORP Ticker: XOM	30231G102	233,984 00 73 120	1.2	119,812 01 37.441	114,171 99	0 00	5,632 00	2 4
1,000.000	NOBLE CORP ISIN CH0033347318 SWITZERLAND Ticker: NE	H5833N103	35,770 00 35.770	0.2	31,312 50 31 313	4,457.50	0.00	348.00	1.0
4,000.000	SCHLUMBERGER LTD NETHERLANDS ANTILLES Ticker: SLB	806857108	334,000.00 83 500	1.7	112,451.00 28.113	221,549.00	840.00	3,360.00	1.0
4,000.000	SPECTRA ENERGY CORP Ticker: SE	847560109	99,960 00 24.990	0 5	107,780 00 26 945	-7,820 00	0 00	4,160.00	4 2
	Total Energy		**$1,403,757.00**	**7.1%**	**$883,635.16**	**$520,121.84**	**$840.00**	**$17,676.00**	**1.3%**
Financials									
3,300.000	ACE LTD SWITZERLAND Ticker: ACE	H0023R105	$205,425.00 62 250	1.0%	$168,263 46 50.989	$37,161 54	$1,089 00	$4,356 00	2 1%
1,000.000	AMERIPRISE FINL INC Ticker: AMP	03076C106	57,550.00 57.550	0 3	47,361.20 47.361	10,188 80	0 00	720 00	1 3
1,750.000	BERKSHIRE HATHAWAY INC DEL NEW CL B COM Ticker: BRK B	084670702	140,192.50 80.110	0 7	130,376.05 74 501	9,816 45	0.00	0.00	0.0

Portfolio Detail

UW MCCURDY ARTICLE 2ND CHAR TR

Oct 01, 2010 through Dec 31, 2010

Units	Description	CUSIP	Market Value/ Market Price	% of Total	Tax Cost/ Average Unit Cost	Unrealized Gain/Loss	Accrued Income	Estimated Annual Income	Cur Yld/ YTM
Equities (cont)									
Financials (cont)									
3,500.000	J P MORGAN CHASE & CO Ticker: JPM	46625H100	148,470.00 42 420	0.7	148,610.00 42.460	-140 00	0.00	700.00	0.5
5,000.000	LEUCADIA NATL CORP Ticker: LUK	527288104	145,900.00 29.180	0 7	102,931 00 20 586	42,969.00	0 00	1,250 00	0 9
2,500.000	PRICE T ROWE GROUP INC Ticker: TROW	74144T108	161,350 00 64.540	0.8	125,517.35 50.207	35,832 65	0 00	2,700.00	1.7
2,000.000	STATE STR CORP Ticker: STT	857477103	92,680 00 46 340	0 5	135,924 00 67.962	-43,244 00	20 00	80 00	0 1
2,000.000	VISA INC CL A COM Ticker. V	92826C839	140,760.00 70 380	0.7	120,053.90 60.027	20,706 10	0 00	1,200 00	0 9
	Total Financials		**$1,092,327.50**	**5.5%**	**$979,036.96**	**$113,290.54**	**$1,109.00**	**$11,006.00**	**1.0%**
Health Care									
3,000.000	ABBOTT LABS Ticker: ABT	002824100	$143,730.00 47.910	0.7%	$147,003 99 49 001	-$3,273 99	$0.00	$5,280.00	3 7%
2,500.000	BAXTER INTL INC Ticker: BAX	071813109	126,550.00 50.620	0 6	142,712 50 57.085	-16,162.50	775.00	3,100 00	2.5
4,000.000	BRISTOL MYERS SQUIBB CO Ticker. BMY	110122108	105,920 00 26.480	0.5	76,927.30 19 232	28,992.70	0.00	5,280.00	5.0
2,000.000	CERNER CORP Ticker: CERN	156782104	189,480 00 94 740	1 0	106,265 00 53.133	83,215 00	0.00	0 00	0 0
1,500.000	COVIDIEN LTD PLC COM IRELAND Ticker: COV	G2554F105	68,490 00 45.660	0 3	67,971 20 45.314	518 80	0 00	1,200 00	1 8
4,000.000	GILEAD SCIENCES INC Ticker: GILD	375558103	144,960.00 36 240	0.7	178,864.10 44.716	-33,904.10	0.00	0.00	0.0
2,000.000	JOHNSON & JOHNSON Ticker: JNJ	478160104	123,700 00 61.850	0 6	133,450.00 66 725	-9,750 00	0 00	4,320 00	3 5

Portfolio Detail

UW MCCURDY ARTICLE 2ND CHAR TR

Oct 01, 2010 through Dec 31, 2010

Units	Description	CUSIP	Market Value/ Market Price	% of Total	Tax Cost/ Average Unit Cost	Unrealized Gain/Loss	Accrued Income	Estimated Annual Income	Cur Yld/ YTM
Equities (cont)									
Health Care (cont)									
4,000.000	TEVA PHARMACEUTICAL INDS LTD ADR ISRAEL Ticker: TEVA	881624209	208,520 00 52.130	1.1	179,862.48 44.966	28,657.52	770 80	2,668.00	1 3
	Total Health Care		**$1,111,350.00**	**5.6%**	**$1,033,056.57**	**$78,293.43**	**$1,545.80**	**$21,848.00**	**2.0%**
Industrials									
4,000.000	CATERPILLAR INC Ticker: CAT	149123101	$374,640.00 93 660	1.9%	$123,340.00 30.835	$251,300 00	$0.00	$7,040.00	1.9%
1,000.000	EMERSON ELEC CO Ticker. EMR	291011104	57,170.00 57.170	0 3	32,013.50 32.014	25,156.50	0 00	1,380 00	2 4
2,000.000	HONEYWELL INTL INC Ticker: HON	438516106	106,320.00 53 160	0.5	60,941 40 30.471	45,378 60	0 00	2,420 00	2.3
3,500.000	ITT CORP NEW COM Ticker: ITT	450911102	182,385.00 52.110	0.9	76,230.00 21.780	106,155.00	875 00	3,500 00	1.9
7,000.000	QUANTA SVCS INC Ticker: PWR	74762E102	139,440.00 19 920	0.7	157,145.00 22 449	-17,705.00	0.00	0.00	0 0
2,200.000	UNION PAC CORP Ticker: UNP	907818108	203,852.00 92 660	1.0	175,280 50 79.673	28,571 50	836 00	3,344 00	1 6
	Total Industrials		**$1,063,807.00**	**5.4%**	**$624,950.40**	**$438,856.60**	**$1,711.00**	**$17,684.00**	**1.7%**
Information Technology									
2,000.000	ADOBE SYS INC Ticker: ADBE	00724F101	$61,560.00 30.780	0.3%	$85,050.00 42.525	-$23,490.00	$0.00	$0 00	0 0%
1,000 000	APPLE INC Ticker· AAPL	037833100	322,560 00 322.560	1 6	188,442 00 188.442	134,118 00	0.00	0 00	0.0
14,000.000	CISCO SYS INC Ticker: CSCO	17275R102	283,220.00 20.230	1.4	156,790.93 11.199	126,429.07	0.00	0 00	0 0
250.000	GOOGLE INC CL A COM Ticker: GOOG	38259P508	148,492 50 593.970	0 7	113,971 85 455.887	34,520 65	0 00	0 00	0 0
4,000.000	HEWLETT PACKARD CO Ticker· HPQ	428236103	168,400 00 42 100	0 8	188,077 20 47.019	-19,677.20	0 00	1,280 00	0 8

Portfolio Detail

UW MCCURDY ARTICLE 2ND CHAR TR

Oct 01, 2010 through Dec 31, 2010

Units	Description	CUSIP	Market Value/ Market Price	% of Total	Tax Cost/ Average Unit Cost	Unrealized Gain/Loss	Accrued Income	Estimated Annual Income	Cur Yld/ YTM
Equities (cont)									
Information Technology (cont)									
12,000.000	INTEL CORP Ticker: INTC	458140100	252,360.00 21.030	1.3	201,440 00 16.787	50,920.00	0.00	7,560 00	3.0
3,000.000	INTERNATIONAL BUSINESS MACHS Ticker: IBM	459200101	440,280 00 146 760	2.2	245,840 00 81.947	194,440.00	0 00	7,800 00	1 8
6,000.000	MICROCHIP TECHNOLOGY INC Ticker: MCHP	595017104	205,260 00 34.210	1 0	174,804.34 29 134	30,455.66	0 00	8,280 00	4.0
13,000.000	MICROSOFT CORP Ticker: MSFT	594918104	362,830.00 27.910	1.8	243,438 30 18 726	119,391 70	0 00	8,320.00	2 3
10,000.000	ORACLE CORP Ticker: ORCL	68389X105	313,000 00 31.300	1 6	183,300 00 18 330	129,700.00	0 00	2,000 00	0.6
	Total Information Technology		**$2,557,962.50**	**12.9%**	**$1,781,154.62**	**$776,807.88**	**$0.00**	**$35,240.00**	**1.4%**
Materials									
1,000.000	BHP BILLITON LTD SPONSORED ADR AUSTRALIA Ticker: BHP	088606108	$92,920.00 92.920	0 5%	$60,085 00 60 085	$32,835 00	$0 00	$1,740 00	1 9%
4,500.000	ECOLAB INC Ticker: ECL	278865100	226,890 00 50 420	1.1	85,371.98 18 972	141,518.02	787.50	3,150.00	1.4
2,500.000	FREEPORT-MCMORAN COPPER & GOLD INC COM Ticker: FCX	35671D857	300,225.00 120 090	1 5	101,497 94 40.599	198,727 06	0.00	5,000 00	1 7
2,000.000	GOLDCORP INC NEW COM CANADA Ticker: GG	380956409	91,960 00 45.980	0 5	79,824 00 39 912	12,136.00	0 00	720 00	0 8
1,600.000	MONSANTO CO NEW COM Ticker: MON	61166W101	111,424.00 69.640	0 6	160,144 40 100.090	-48,720.40	0.00	1,792.00	1 6
2,800.000	RIO TINTO PLC SPONSORED ADR UNITED KINGDOM Ticker: RIO	767204100	200,648 00 71 660	1 0	118,183 30 42 208	82,464 70	0 00	2,475 20	1 2

Portfolio Detail

UW MCCURDY ARTICLE 2ND CHAR TR

Oct 01, 2010 through Dec 31, 2010

Units	Description	CUSIP	Market Value/ Market Price	% of Total	Tax Cost/ Average Unit Cost	Unrealized Gain/Loss	Accrued Income	Estimated Annual Income	Cur Yld/ YTM
Equities (cont)									
Materials (cont)									
8,108.000	WEYERHAEUSER CO Ticker: WY	962166104	153,484.44 18 930	0.8	241,970.67 29.843	-88,486.23	0.00	1,621.60	1.1
	Total Materials		**$1,177,551.44**	**5.9%**	**$847,077.29**	**$330,474.15**	**$787.50**	**$16,498.80**	**1.4%**
Utilities									
8,000.000	DUKE ENERGY CORP NEW COM Ticker: DUK	26441C105	$142,480.00 17 810	0.7%	$135,513.07 16.939	$6,966.93	$0 00	$7,840.00	5.5%
3,000 000	NEXTERA ENERGY INC Ticker: NEE	65339F101	155,970.00 51.990	0.8	182,013 60 60 671	-26,043.60	0.00	6,000 00	3 8
9,000.000	SOUTHERN UN CO NEW Ticker: SUG	844030106	216,630 00 24.070	1.1	122,885 80 13.654	93,744 20	1,350.00	5,400 00	2.5
	Total Utilities		**$515,080.00**	**2.6%**	**$440,412.47**	**$74,667.53**	**$1,350.00**	**$19,240.00**	**3.7%**
Other Equities									
16,000 000	ISHARES FTSE CHINA 25 INDEX FUND Ticker: FXI	464287184	$689,440 00 43 090	3.5%	$506,590 00 31.662	$182,850.00	$0 00	$10,048 00	1 5%
3,800.000	ISHARES INC MSCI BRAZIL FREE INDEX FUND Ticker: EWZ	464286400	294,120 00 77.400	1.5	215,539 00 56 721	78,581.00	753.86	10,666.60	3 6
10,000.000	ISHARES MSCI EMERGING MKTS INDEX FUND Ticker: EEM	464287234	476,420.00 47.642	2 4	328,830 00 32.883	147,590.00	0.00	6,460 00	1.4
9,000.000	ISHARES S&P SMALLCAP 600 INDEX FUND Ticker: IJR	464287804	616,230.00 68 470	3.1	471,170 80 52.352	145,059 20	0.00	6,633 00	1.1
5,000.000	SPDR S&P HOMEBUILDERS ETF Ticker: XHB	78464A888	86,950 00 17.390	0 4	120,500 00 24 100	-33,550 00	0 00	1,680 00	1 9
	Total Other Equities		**$2,163,160.00**	**10.9%**	**$1,642,629.80**	**$520,530.20**	**$753.86**	**$35,487.60**	**1.6%**
Total Equities			**$12,730,888.44**	**64.2%**	**$9,345,467.84**	**$3,385,420.60**	**$12,647.16**	**$212,740.90**	**1.7%**

Portfolio Detail

UW MCCURDY ARTICLE 2ND CHAR TR

Oct 01, 2010 through Dec 31, 2010

Units	Description	CUSIP	Market Value/ Market Price	% of Total	Tax Cost/ Average Unit Cost	Unrealized Gain/Loss	Accrued Income	Estimated Annual Income	Cur Yld/ YTM
Fixed Income									
Investment Grade Taxable									
	2011								
10,000.000	GOLDMAN SACHS GROUP INC SR NT DTD 01/17/06 5.000% DUE 01/15/11 Moody's: A1 S&P: A	38141GEF7	$10,010.90 100 109	0.1%	$10,140.70 101.407	-$129 80	$230 55	$500 00	5 0% 3 0
376,974.000	UNITED STATES TREAS NT INFLATION INDEX DTD 01/16/01 3 500% DUE 01/15/11 Moody's: AAA S&P: AAA	9128276R8	377,358.51 100.102	1.9	383,283.23 101 674	-5,924 72	6,095 09	13,194 09	3.5 0 6
100,000.000	MORGAN STANLEY FDIC GTD NT DTD 12/22/08 2 000% DUE 09/22/11 Moody's: AAA S&P: AAA	61757UAF7	101,212 00 101.212	0 5	100,674.00 100 674	538 00	550.00	2,000 00	2.0 0 3
	2012								
200,000.000	CHEVRON CORP SR NT DTD 03/03/09 3.450% DUE 03/03/12 Moody's: AA1 S&P: AA	166751AK3	206,374 00 103 187	1.0	201,696 00 100.848	4,678.00	2,261 66	6,900 00	3 3 0 8
100,000 000	PEPSICO INC SR NT DTD 05/21/07 5 150% DUE 05/15/12 Moody's AA3 S&P: A-	713448BF4	105,704 00 105.704	0 5	102,956 00 102.956	2,748 00	658 05	5,150 00	4 9 1.0
182,454.000	UNITED STATES TREAS NT INFLATION INDEX DTD 07/15/02 3.000% DUE 07/15/12 Moody's: AAA S&P: AAA	912828AF7	193,800 81 106.219	1 0	190,913 27 104.636	2,887.54	2,528 57	5,473 62	2 8
100,000.000	WELLS FARGO & CO NEW NEW SUB NT DTD 09/05/02 5.125% DUE 09/01/12 Moody's: A2 S&P A+	949746CL3	105,622.00 105.622	0.5	100,319.00 100 319	5,303.00	1,708.33	5,125.00	4 9 1 8
100,000.000	DEERE JOHN CAP CORP MTN DTD 03/30/09 5.250% DUE 10/01/12 Moody's: A2 S&P. A	24422EQW2	107,563.00 107.563	0 5	100,425 00 100 425	7,138 00	1,312 49	5,250 00	4 9 1 0

Units	Description	CUSIP	Market Value/ Market Price	% of Total	Tax Cost/ Average Unit Cost	Unrealized Gain/Loss	Accrued Income	Estimated Annual Income	Cur Yld/ YTM
Fixed Income (cont)									
Investment Grade Taxable (cont)									
	2013								
20,000.000	GOLDMAN SACHS GROUP INC SR NT DTD 03/31/03 5.250% DUE 04/01/13 Moody's. A1 S&P: A	38141GDB7	21,470.80 107.354	0.1	19,705 80 98.529	1,765.00	262.49	1,050 00	4.9 2 0
100,000.000	WACHOVIA CORP GLOBAL SR MTN DTD 04/25/08 5 500% DUE 05/01/13 Moody's: A1 S&P. AA-	92976WBJ4	108,820.00 108.820	0.5	100,400.00 100.400	8,420.00	916.66	5,500.00	5 1 1.7
100,000.000	FEDERAL HOME LN BKS CONS BD DTD 08/01/08 4.000% DUE 09/06/13 Moody's: AAA S&P: AAA	3133XRX88	107,686.00 107.686	0.5	103,072 60 103 073	4,613.40	1,277.77	4,000.00	3.7 1 2
	2014								
100,000.000	HEWLETT PACKARD CO NT DTD 12/05/08 6.125% DUE 03/01/14 Moody's: A2 S&P: A	428236AT0	113,242.00 113.242	0 6	100,605 00 100.605	12,637.00	2,041 67	6,125 00	5.4 1.9
100,000.000	BOEING CO SR UNSECD NT DTD 03/13/09 5.000% DUE 03/15/14 Moody's: A2 S&P. A	097023AV7	109,698 00 109.698	0.6	100,887.00 100 887	8,811 00	1,472 22	5,000 00	4.6 2.0
200,000.000	JPMORGAN CHASE & CO GLOBAL SUB HLDG CO NT DTD 09/15/04 5.125% DUE 09/15/14 Moody's A1 S&P: A	46625HBV1	212,814.00 106.407	1.1	198,152.00 99.076	14,662 00	3,018.06	10,250.00	4.8 3 3
	2015								
200,000.000	PROCTER & GAMBLE CO NT DTD 02/06/09 3.500% DUE 02/15/15 Moody's: AA3 S&P: AA-	742718DM8	209,984 00 104 992	1.1	200,084.00 100.042	9,900.00	2,644.44	7,000 00	3 3 2.3
100,000.000	GENERAL ELEC CAP CORP MTN DTD 03/04/05 4.875% DUE 03/04/15 Moody's AA2 S&P: AA+	36962GP65	106,709.00 106 709	0.5	99,265.00 99 265	7,444.00	1,584 37	4,875 00	4 6 3 2

Portfolio Detail

UW MCCURDY ARTICLE 2ND CHAR TR

Oct. 01, 2010 through Dec 31, 2010

Units	Description	CUSIP	Market Value/ Market Price	% of Total	Tax Cost/ Average Unit Cost	Unrealized Gain/Loss	Accrued Income	Estimated Annual Income	Cur Yld/ YTM
Fixed Income (cont)									
Investment Grade Taxable (cont)									
100,000.000	MERCK & CO INC SR UNSECD NT DTD 06/25/09 4 000% DUE 06/30/15 Moody's: AA3 S&P. AA	589331AP2	107,290.00 107.290	0 5	100,403.00 100.403	6,887.00	11.11	4,000.00	3.7 2 3
189,628.811	INTERMEDIATE TERM TAXABLE BOND FUND FOR TRUSTS ORIGINAL COST 2,302,949 24	45899T998	2,471,489 18 13 033	12 5	2,384,790.02 12 576	86,699 16	2,304 94	105,054 36	4 3
15,000.000	JPMORGAN CHASE CAP XXVI CAP SECS VAR SER Z Moody's: AA3 S&P: BBB+	48124G104	403,650 00 26 910	2 0	371,267.30 24 751	32,382 70	0 00	30,000 00	7.4
110,837.000	LONG TERM TAXABLE BOND FUND FOR TRUSTS ORIGINAL COST 909,255.60	995555927	1,052,951.50 9 500	5.3	1,016,489.84 9.171	36,461.66	1,085.26	49,433.30	4.7
	Total Investment Grade Taxable		**$6,233,449.70**	**31.4%**	**$5,985,528.76**	**$247,920.94**	**$31,963.73**	**$275,880.37**	**4.4%**
Total Fixed Income			**$6,233,449.70**	**31.4%**	**$5,985,528.76**	**$247,920.94**	**$31,963.73**	**$275,880.37**	**4.4%**
Hedge Funds									
Hedge Fund Fund of Funds									
2.713	EXCELSIOR ABSOLUTE RETURN LIQUIDATING TR 2 (VALUATION AS OF 11/30/10)	99Z353023	$17,700.10 6,524 180	0 1%	$15,102 12 5,566 576	$2,597 98	$0.00	$0.00	0 0%
243.564	EXCELSIOR MULTI-STRATEGY HEDGE FUND OF FUNDS (TI) LLC (VALUATION AS OF 11/30/10)	3007229X5	368,064.42 1,511 161	1.9	362,175 00 1,486.981	5,889 42	0.00	0.00	0 0
	Total Hedge Fund Fund of Funds		**$385,764.52**	**1.9%**	**$377,277.12**	**$8,487.40**	**$0.00**	**$0.00**	**0.0%**
Hedge Funds Special Situations									
1.720	EXCELSIOR ABSOLUTE LIQ TRUST (ACTUAL CAPITAL BAL MAY DIFFER SLIGHTLY DUE TO ROUNDING OF UNITS) (VALUATION AS OF 11/30/10)	99Z305627	$10,245 44 5,956.651	0 1%	$5,561 86 3,233 640	$4,683 58	$0 00	$0 00	0 0%

Portfolio Detail

UW MCCURDY ARTICLE 2ND CHAR TR

Oct 01, 2010 through Dec 31, 2010

Units	Description	CUSIP	Market Value/ Market Price	% of Total	Tax Cost/ Average Unit Cost	Unrealized Gain/Loss	Accrued Income	Estimated Annual Income	Cur Yld/ YTM
Hedge Funds (cont)									
Hedge Funds Special Situations (cont)									
	Total Hedge Funds Special Situations		**$10,245.44**	**0.1%**	**$5,561.86**	**$4,683.58**	**$0.00**	**$0.00**	**0.0%**
Total Hedge Funds			**$396,009.96**	**2.0%**	**$382,838.98**	**$13,170.98**	**$0.00**	**$0.00**	**0.0%**
Private Equity									
Private Equity Specific Strategy									
98.736	UST EXCELSIOR VENTURE PARTNER III LLC (VALUATION AS OF 10/31/10)	300862109	$12,482 51 126.423	0.1%	$14,213.00 143.950	-$1,730 49	$0.00	$0 00	0 0%
	Total Private Equity Specific Strategy		**$12,482.51**	**0.1%**	**$14,213.00**	**-$1,730.49**	**$0.00**	**$0.00**	**0.0%**
Total Private Equity			**$12,482.51**	**0.1%**	**$14,213.00**	**-$1,730.49**	**$0.00**	**$0.00**	**0.0%**
Total Portfolio			**$19,837,437.63**	**100.0%**	**$16,192,655.60**	**$3,644,782.03**	**$44,610.89**	**$488,621.27**	**2.5%**

Form **8868**
(Rev January 2011)
Department of the Treasury
Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

OMB No 1545-1709

▶ **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension, complete only Part I** and check this box . . . . ▶ ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension, complete only Part II** (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Electronic filing *(e-file)*. You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit *www.irs.gov/efile* and click on *e-file for Charities & Nonprofits*.

Part I **Automatic 3-Month Extension of Time.** Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only . . . . ▶ ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Type or print

File by the due date for filing your return See instructions

Name of exempt organization: UW MCCURDY ARTICLE 2ND CHAR TR

Employer identification number: 13-6216017

Number, street, and room or suite no. If a P.O. box, see instructions: P O BOX 1802

City, town or post office, state, and ZIP code. For a foreign address, see instructions: PROVIDENCE, RI 02901-1802

Enter the Return code for the return that this application is for (file a separate application for each return) 0 4

Application Is For	**Return Code**	**Application Is For**	**Return Code**
Form 990	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

- The books are in the care of ▶ BANK OF AMERICA, N.A.

Telephone No. ▶ (401)278-6825 FAX No. ▶

- If the organization does not have an office or place of business in the United States, check this box . . . . ▶ ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ______ . If this is for the whole group, check this box . . . . . . ▶ ☐ . If it is for part of the group, check this box . . . . ▶ ☐ and attach a list with the names and EINs of all members the extension is for.

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 08/15 , 20 11 , to file the exempt organization return for the organization named above. The extension is for the organization's return for:

▶ ☒ calendar year 2010 or

▶ ☐ tax year beginning ______, 20 ___, and ending ______, 20 ___.

2 If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

3a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	**3a**	$ 5,980.
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	**3b**	$ 7,900.
c	**Balance Due.** Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	**3c**	$

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

For Paperwork Reduction Act Notice, see Instructions.

- If you are filing for an **Additional (Not Automatic) 3-Month Extension, complete only Part II** and check this box . . . . ▶ ☒

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

- If you are filing for an **Automatic 3-Month Extension, complete only Part I** (on page 1).

Part II **Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

Type or print
File by the extended due date for filing your return. See instructions.

Name of exempt organization: UW MCCURDY ARTICLE 2ND CHAR TR
Employer identification number: 13-6216017
Number, street, and room or suite no. If a P.O. box, see instructions.: P O BOX 1802
City, town or post office, state, and ZIP code. For a foreign address, see instructions.: PROVIDENCE, RI 02901-1802

Enter the Return code for the return that this application is for (file a separate application for each return) 0 4

Application Is For	Return Code	Application Is For	Return Code
Form 990	01		
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

- The books are in the care of ▶ PRIVATE BANK TAX SERVICES
  Telephone No. ▶ (401)278-6825 FAX No. ▶
- If the organization does not have an office or place of business in the United States, check this box . . . . ▶ ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ______ . If this is for the whole group, check this box . . . . . . ▶ ☐ . If it is for part of the group, check this box . . . . ▶ ☐ and attach a list with the names and EINs of all members the extension is for.

4 I request an additional 3-month extension of time until 11/15 , 20 11 .

5 For calendar year 2010 , or other tax year beginning ______ , 20 ___ , and ending ______ , 20 ___ .

6 If the tax year entered in line 5 is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

7 State in detail why you need the extension ADDITIONAL TIME REQUESTED TO FILE A COMPLETE AND ACCURATE RETURN

8a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	**8a**	$ 5,980.
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	**8b**	$ 7,900.
c	**Balance Due.** Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	**8c**	$

Signature and Verification

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature ▶ Title ▶ Date ▶