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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

OMB No 1545-0052

2010

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

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

OLIVE D KEEFFER MEDICAL EQUIPMENT FUND
430043018

A Employer identification number

22-3481081

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

PO BOX 477

Room/suite

B Telephone number (see page 10 of the instructions)

(802) 860-5553

City or town, state, and ZIP code

CONCORD, NH 03302-0477

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) ▶ \$ 600,028.

J Accounting method:

☒ Cash ☐ Accrual☐ Other (specify)

(Part I, column (d) must be on cash basis.)

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

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)

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
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	3	3		STMT 1
4 Dividends and interest from securities	18,464	18,464		STMT 2
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	64,743			
b Gross sales price for all assets on line 6a	642,037			
7 Capital gain net income (from Part IV, line 2)		64,743		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)				
12 Total. Add lines 1 through 11	83,210	83,210		
13 Compensation of officers, directors, trustees, etc.	7,775	7,775		
14 Other employee salaries and wages		NONE	NONE	
15 Pension plans, employee benefits		NONE	NONE	
16a Legal fees (attach schedule)				
b Accounting fees (attach schedule) STMT 3	575	575	NONE	NONE
c Other professional fees (attach schedule)				
17 Interest				
18 Taxes (attach schedule) (see page 14 of the instructions)	192	121		
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings		NONE	NONE	
22 Printing and publications		NONE	NONE	
23 Other expenses (attach schedule) STMT 5	32	32		
24 Total operating and administrative expenses				
Add lines 13 through 23	8,574	8,503	NONE	NONE
25 Contributions, gifts, grants paid	19,472			19,472
26 Total expenses and disbursements. Add lines 24 and 25	28,046	8,503	NONE	19,472
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	55,164			
b Net investment income (if negative, enter -0-)		74,707		
c Adjusted net income (if negative, enter -0-)				

For Paperwork Reduction Act Notice, see page 30 of the instructions.

JSA

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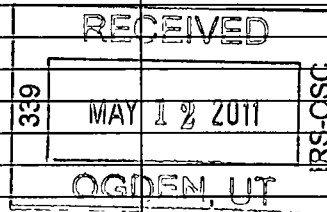
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POSTMARK DATE MAY 09 2011

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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			
	2 Savings and temporary cash investments	20,513.	32,732.	32,732.
	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) ▶ Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10 a Investments - U S and state government obligations (attach schedule) . .			
	b Investments - corporate stock (attach schedule) . STMT 6 .	269,345.	301,279.	316,550.
	c Investments - corporate bonds (attach schedule) . STMT 7 .	255,274.	266,283.	250,746.
	11 Investments - land, buildings, and equipment basis ▶ Less: accumulated depreciation (attach schedule) ▶			
	12 Investments - mortgage loans			
	13 Investments - other (attach schedule)			
	14 Land, buildings, and equipment basis ▶ Less: accumulated depreciation (attach schedule) ▶			
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	545,132.	600,294.	600,028.	
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	545,132.	600,294.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds . .			
	30 Total net assets or fund balances (see page 17 of the instructions)	545,132.	600,294.	
31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	545,132.	600,294.		

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	545,132.
2 Enter amount from Part I, line 27a	2	55,164.
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	600,296.
5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 8	5	2.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	600,294.

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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)			2	64,743.	
{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7					
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):			3		
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.					

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	22,397.	501,074.	0.04469798872
2008	28,630.	571,415.	0.05010368996
2007	NONE	NONE	NONE
2006			
2005			
2 Total of line 1, column (d)			2 0.09480167868
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 0.03160055956
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5			4 562,155.
5 Multiply line 4 by line 3			5 17,764.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 747.
7 Add lines 5 and 6			7 18,511.
8 Enter qualifying distributions from Part XII, line 4			8 19,472.

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	747.
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	747.
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	747.
6	Credits/Payments:		
a	2010 estimated tax payments and 2009 overpayment credited to 2010	6a	
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	NONE
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	747.
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be: Credited to 2011 estimated tax ☐ Refunded ☐	11	

Part VII-A Statements Regarding Activities

		Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		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)?		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?		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?		X
	If "Yes," attach a detailed description of the activities.		
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		X
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b	If "Yes," has it filed a tax return on Form 990-T for this year?		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		X
	If "Yes," attach the statement required by General Instruction T.		
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		X
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV		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		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		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see 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 ☐ TD BANK, N.A. Telephone no. ☐ (802) 860-5553			
	Located at ☐ 111 MAIN STREET, BURLINGTON, VT ZIP + 4 ☐ 05401			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here	15		☐
and enter the amount of tax-exempt interest received or accrued during the year ☐ 15				
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	Yes	No
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	
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

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to:

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? **5b** ☐ Yes ☒ No

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

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** ☐ Yes ☒ No

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		7,775.	-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 **10** NONE

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3 Five highest-paid independent contractors for professional services** (see 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	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	552,237.
b	Average of monthly cash balances	1b	18,479.
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	570,716.
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	570,716.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	8,561.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	562,155.
6	Minimum investment return. Enter 5% of line 5	6	28,108.

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	28,108.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	747.
b	Income tax for 2010. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	747.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	27,361.
4	Recoveries of amounts treated as qualifying distributions	4	NONE
5	Add lines 3 and 4	5	27,361.
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	27,361.

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	19,472.
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	19,472.
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	747.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	18,725.

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				27,361.
2 Undistributed income, if any, as of the end of 2010:				
a Enter amount for 2009 only			2,248.	
b Total for prior years: 20 <u>08</u> , 20 <u> </u> , 20 <u> </u>		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: ► \$ <u>19,472.</u>				
a Applied to 2009, but not more than line 2a . . .			2,248.	
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				17,224.
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.				10,137.
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)

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 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	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 STATEMENT 12				
Total			3a	19,472.
b Approved for future payment				
Total			3b	

Form 990-PF (2010)

Enter gross amounts unless otherwise indicated.

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

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.)
----------------------	--

Form 990-PF (2010)

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 LONG-TERM CAPITAL GAIN DIVIDENDS					4,451.	
520.00		38.497 ARTIO TOTAL RETURN BOND FD-I #152 PROPERTY TYPE: SECURITIES 501.00					08/07/2006	02/10/2010
							19.00	
1,337.00		97.956 ARTIO TOTAL RETURN BOND FD-I #152 PROPERTY TYPE: SECURITIES 1,275.00					08/07/2006	06/11/2010
							62.00	
246.00		17.792 ARTIO TOTAL RETURN BOND FD-I #152 PROPERTY TYPE: SECURITIES 232.00					08/07/2006	07/16/2010
							14.00	
1,873.00		131.514 ARTIO TOTAL RETURN BOND FD-I #15 PROPERTY TYPE: SECURITIES 1,796.00					04/16/2010	10/18/2010
							77.00	
25,381.00		1782.368 ARTIO TOTAL RETURN BOND FD-I #1 PROPERTY TYPE: SECURITIES 23,212.00					10/16/2009	10/18/2010
							2,169.00	
2,456.00		53.712 BARON ASSET FD GROWTH & INC PROPERTY TYPE: SECURITIES 2,348.00					12/01/2004	04/16/2010
							108.00	
1,405.00		30.947 BARON ASSET FD GROWTH & INC PROPERTY TYPE: SECURITIES 1,288.00					07/16/2010	10/18/2010
							117.00	
28,618.00		630.343 BARON ASSET FD GROWTH & INC PROPERTY TYPE: SECURITIES 27,152.00					07/16/2009	10/18/2010
							1,466.00	
5,028.00		109.675 COLUMBIA VALUE & RESTRUCTURING F PROPERTY TYPE: SECURITIES 4,631.00					08/07/2006	04/16/2010
							397.00	
14,573.00		317.975 COLUMBIA VALUE & RESTRUCTURING F PROPERTY TYPE: SECURITIES 12,881.00					07/16/2010	10/18/2010
							1,692.00	

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)	
55,136.00		1203.064 COLUMBIA VALUE & RESTRUCTURING PROPERTY TYPE: SECURITIES 49,992.00					01/16/2009 5,144.00	10/18/2010
1,399.00		42.143 DAVIS NY VENTURE FD INC CL Y PROPERTY TYPE: SECURITIES 1,559.00					05/03/2007 -160.00	04/16/2010
259.00		8.653 DAVIS NY VENTURE FD INC CL Y PROPERTY TYPE: SECURITIES 320.00					05/03/2007 -61.00	07/16/2010
2,146.00		65.253 DAVIS NY VENTURE FD INC CL Y PROPERTY TYPE: SECURITIES 1,975.00					06/11/2010 171.00	10/18/2010
27,912.00		848.894 DAVIS NY VENTURE FD INC CL Y PROPERTY TYPE: SECURITIES 30,221.00					01/16/2009 -2,309.00	10/18/2010
1,364.00		124.675 FEDERATED TOTAL RETURN BOND FUND PROPERTY TYPE: SECURITIES 1,288.00					07/31/1994 76.00	02/10/2010
2,772.00		250.89 FEDERATED TOTAL RETURN BOND FUND PROPERTY TYPE: SECURITIES 2,592.00					07/31/1994 180.00	06/11/2010
495.00		44.131 FEDERATED TOTAL RETURN BOND FUND PROPERTY TYPE: SECURITIES 456.00					07/31/1994 39.00	07/16/2010
3,715.00		324.984 FEDERATED TOTAL RETURN BOND FUND PROPERTY TYPE: SECURITIES 3,598.00					04/16/2010 117.00	10/18/2010
50,233.00		4394.829 FEDERATED TOTAL RETURN BOND FUN PROPERTY TYPE: SECURITIES 45,575.00					10/16/2009 4,658.00	10/18/2010
4,695.00		241.036 FIDELITY ADVISOR EMERGING MARKET PROPERTY TYPE: SECURITIES 4,557.00					06/11/2008 138.00	02/10/2010

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)	
609.00		27.715 FIDELITY ADVISOR EMERGING MARKET PROPERTY TYPE: SECURITIES 524.00					06/11/2008 85.00	04/16/2010
256.00		12.85 FIDELITY ADVISOR EMERGING MARKET C PROPERTY TYPE: SECURITIES 243.00					06/11/2008 13.00	07/16/2010
820.00		34.36 FIDELITY ADVISOR EMERGING MARKET C PROPERTY TYPE: SECURITIES 674.00					06/11/2010 146.00	10/18/2010
9,083.00		380.515 FIDELITY ADVISOR EMERGING MARKET PROPERTY TYPE: SECURITIES 6,374.00					01/16/2009 2,709.00	10/18/2010
9,239.00		421.106 HARTFORD MUT FDS INC MIDCAP FD C PROPERTY TYPE: SECURITIES 8,624.00					06/11/2010 615.00	10/18/2010
11,518.00		863.445 MFS RESEARCH INTERNATIONAL FUND PROPERTY TYPE: SECURITIES 14,480.00					03/12/2008 -2,962.00	02/10/2010
377.00		25.92 MFS RESEARCH INTERNATIONAL FUND I PROPERTY TYPE: SECURITIES 435.00					03/12/2008 -58.00	04/16/2010
674.00		51.198 MFS RESEARCH INTERNATIONAL FUND I PROPERTY TYPE: SECURITIES 859.00					03/12/2008 -185.00	07/16/2010
1,475.00		95.628 MFS RESEARCH INTERNATIONAL FUND I PROPERTY TYPE: SECURITIES 1,227.00					06/11/2010 248.00	10/18/2010
14,526.00		942.054 MFS RESEARCH INTERNATIONAL FUND PROPERTY TYPE: SECURITIES 14,722.00					04/16/2009 -196.00	10/18/2010
2,245.00		205.588 PIMCO TOTAL RETURN FUND #35 PROPERTY TYPE: SECURITIES 2,235.00					12/01/2004 10.00	02/10/2010

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)	
5,853.00		526.313 PIMCO TOTAL RETURN FUND #35 PROPERTY TYPE: SECURITIES 5,723.00					12/01/2004 130.00	06/11/2010
1,264.00		111.584 PIMCO TOTAL RETURN FUND #35 PROPERTY TYPE: SECURITIES 1,213.00					12/01/2004 51.00	07/16/2010
7,084.00		605.967 PIMCO TOTAL RETURN FUND #35 PROPERTY TYPE: SECURITIES 6,726.00					04/16/2010 358.00	10/18/2010
102,291.00		8750.262 PIMCO TOTAL RETURN FUND #35 PROPERTY TYPE: SECURITIES 93,836.00					10/16/2009 8,455.00	10/18/2010
6,679.00		228.432 T ROWE PRICE GROWTH STOCK FUND PROPERTY TYPE: SECURITIES 6,010.00					12/01/2004 669.00	04/16/2010
21,630.00		717.664 T ROWE PRICE GROWTH STOCK FUND PROPERTY TYPE: SECURITIES 18,701.00					07/16/2010 2,929.00	10/18/2010
72,795.00		2415.24 T ROWE PRICE GROWTH STOCK FUND PROPERTY TYPE: SECURITIES 62,801.00					01/16/2009 9,994.00	10/18/2010
1,396.00		26.194 PRICE T ROWE MIDCAP GROWTH PROPERTY TYPE: SECURITIES 999.00					07/01/2009 397.00	04/16/2010
13,633.00		272.434 PRICE T ROWE MIDCAP GROWTH PROPERTY TYPE: SECURITIES 10,407.00					02/10/2010 3,226.00	06/11/2010
221.00		21.697 TD ASSET MGMT SHORT TERM BOND #4 PROPERTY TYPE: SECURITIES 219.00					01/16/2009 2.00	02/10/2010
733.00		71.739 TD ASSET MGMT SHORT TERM BOND #4 PROPERTY TYPE: SECURITIES 725.00					01/16/2009 8.00	06/11/2010

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)	
103.00		6.653 VANGUARD SELECTED VALUE FD #934 PROPERTY TYPE: SECURITIES 77.00					01/16/2009 26.00	02/10/2010
3,258.00		184.458 VANGUARD SELECTED VALUE FD #934 PROPERTY TYPE: SECURITIES 2,142.00					01/16/2009 1,116.00	04/16/2010
2,081.00		117.709 VANGUARD SELECTED VALUE FD #934 PROPERTY TYPE: SECURITIES 1,925.00					07/16/2010 156.00	10/18/2010
43,495.00		2459.829 VANGUARD SELECTED VALUE FD #934 PROPERTY TYPE: SECURITIES 28,568.00					04/16/2009 14,927.00	10/18/2010
1,223.00		113.794 VANGUARD GNMA FUND #36 PROPERTY TYPE: SECURITIES 1,185.00					03/12/2008 38.00	02/10/2010
4,754.00		434.578 VANGUARD GNMA FUND #36 PROPERTY TYPE: SECURITIES 4,524.00					03/12/2008 230.00	06/11/2010
333.00		30.132 VANGUARD GNMA FUND #36 PROPERTY TYPE: SECURITIES 314.00					03/12/2008 19.00	07/16/2010
5,368.00		484.068 VANGUARD GNMA FUND #36 PROPERTY TYPE: SECURITIES 5,204.00					04/16/2010 164.00	10/18/2010
61,007.00		5501.102 VANGUARD GNMA FUND #36 PROPERTY TYPE: SECURITIES 58,149.00					10/16/2009 2,858.00	10/18/2010

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 GAIN (LOSS)							----- 64,743. =====	

FORM 990PF, PART I - INTEREST ON TEMPORARY CASH INVESTMENTS
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
TD ASSET MGMT US GOVT PORT INSTL #2	3.	3.
	-----	-----
TOTAL	3.	3.
	=====	=====

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

=====

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
-----	-----	-----
ASTON FDS MONTAG & CALDWELL GROWTH FUND	814.	814.
INVESCO INTERNATIONAL GROWTH FUND INSTIT	448.	448.
ARTIO TOTAL RETURN BOND FD-I #1524	764.	764.
COLUMBIA VALUE & RESTRUCTURING FUND #205	684.	684.
DODGE & COX STK FD COM	262.	262.
FEDERATED TOTAL RETURN BOND FUND INSTITU	1,891.	1,891.
FIDELITY SPARTAN HIGH INCOME	703.	703.
FIDELITY SELECT PORTFOLIOS SELECT GOLD P	575.	575.
HARBOR INTERNATIONAL FD- INST CL FUND #1	492.	492.
PERKINS MID CAP VALUE FUND INSTITUTIONAL	55.	55.
PIMCO TOTAL RETURN FUND #35	2,580.	2,580.
PIMCO INVESTMENT GRADE CORP BOND FUND CL	5,615.	5,615.
ROYCE SPECIAL EQUITY FD #327	19.	19.
TD ASSET MGMT US GOVT PORT INSTL #2	5.	5.
TD ASSET MGMT SHORT TERM BOND #4	426.	426.
VANGUARD GNMA FUND #36	1,916.	1,916.
VANGUARD INTERMEDIATE TERM TREASURY FUND	776.	776.
VANGUARD INFLATION PROTECTED SEC 119	439.	439.
	-----	-----
TOTAL	18,464.	18,464.
	=====	=====

FORM 990PF, PART I - ACCOUNTING FEES
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----	ADJUSTED NET INCOME -----	CHARITABLE PURPOSES -----
TAX PREPARATION FEE (NON-ALLOC	575.	575.		
TOTALS	575.	575.	NONE	NONE
	=====	=====	=====	=====

FORM 990PF, PART I - TAXES

=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
990-PF TAXES	71.	
FOREIGN TAXES ON QUALIFIED FOR	121.	121.
	-----	-----
TOTALS	192.	121.
	=====	=====

FORM 990PF, PART I - OTHER EXPENSES
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
STATE/PROBATE FEES	32.	32.
TOTALS	32.	32.
	=====	=====

OLIVE D KEFFER MEDICAL EQUIPMENT FUND
FORM 990PF, PART II - CORPORATE STOCK
=====

22-3481081

DESCRIPTION -----	ENDING BOOK VALUE -----	ENDING FMV ---
4366.461 ASTON FDS MONTAG & CA	101,040.	105,799.
1070.038 INVESCO INTERNATIONAL	29,287.	29,854.
243.956 BUFFALO SMALL CAP FD	5,857.	6,394.
1007.779 DODGE & COX STK FD	101,040.	108,598.
324.509 FIDELITY SELECT PORTFO	17,572.	17,235.
489.994 HARBOR INTERNATIONAL F	29,287.	29,669.
267.950 HARTFORD MUT FDS INC	5,482.	6,455.
275.383 PERKINS MID CAP VALUE	5,857.	6,215.
303.335 ROYCE SPECIAL EQUITY F	5,857.	6,331.
	-----	-----
TOTALS	301,279.	316,550.
	=====	=====

OLIVE D KEFFER MEDICAL EQUIPMENT FUND
 FORM 990PF, PART II - CORPORATE BONDS
 =====

22-3481081

DESCRIPTION -----	ENDING BOOK VALUE -----	ENDING FMV ----
3917.983 FIDELITY HIGH INCOME	35,144.	35,027.
6873.713 PIMCO INVESTMENT GRAD	82,003.	72,037.
4829.077 TD ASSET MGMT SHORT	49,561.	49,305.
5364.799 VANGUARD INTERMEDIATE	64,431.	60,783.
2584.140 VANGUARD INFLATION PR	35,144.	33,594.
	-----	-----
TOTALS	266,283.	250,746.
	=====	=====

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

DESCRIPTION -----	AMOUNT -----
ROUNDING ADJUSTMENT	2.

TOTAL	2.
	=====

STATE(S) WHERE THE FOUNDATION IS REGISTERED
=====

VT

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

=====

OFFICER NAME:

Kelly Kimball, c/o TD Bank, N.A.

ADDRESS:

111 Main Street

Burlington, VT 05401

TITLE:

Trustee

AVERAGE HOURS PER WEEK DEVOTED TO POSITION: 1

COMPENSATION 7,775.

TOTAL COMPENSATION:

7,775.

=====

AVERAGE MONTHLY FMV - 990PF, PART X, LINES 1a-1c

=====

MONTH -----	LINE 1a-FMV SECURITIES -----	LINE 1b-FMV CASH BALANCES -----	LINE 1c-FMV OTHER ASSETS -----
JANUARY	532,204.	19,891.	
FEBRUARY	541,386.	15,791.	
MARCH	560,523.	16,182.	
APRIL	565,411.	19,110.	
MAY	542,368.	16,996.	
JUNE	530,022.	17,219.	
JULY	550,401.	18,580.	
AUGUST	538,211.	16,242.	
SEPTEMBER	567,375.	8,533.	
OCTOBER	568,519.	21,540.	
NOVEMBER	563,130.	18,933.	
DECEMBER	567,296.	32,732.	
	-----	-----	-----
TOTAL	6,626,846.	221,749.	
	=====	=====	=====
AVERAGE FMV	552,237.	18,479.	
	=====	=====	=====

RECIPIENT NAME:
MT ASCUTNEY HOSPITAL & HEALTH CT
ADDRESS:
ATTN: JEANNE MCNEIL
WINDSOR, VT 05089
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
FINANCIAL SUPPORT
FOUNDATION STATUS OF RECIPIENT:
HOSPITAL
AMOUNT OF GRANT PAID 19,472.

TOTAL GRANTS PAID: 19,472.
=====

[illegible]

OLIVE D KEFFER MEDICAL EQUIPMENT FUND
Schedule D Detail of Long-term Capital Gains and Losses

22-3481081

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
CAPITAL GAINS (LOSSES) HELD FOR INVESTMENT PURPOSES					
38.497 ARTIO TOTAL RETURN	08/07/2006	02/10/2010	520.00	501.00	19.00
97.956 ARTIO TOTAL RETURN	08/07/2006	06/11/2010	1,337.00	1,275.00	62.00
17.792 ARTIO TOTAL RETURN	08/07/2006	07/16/2010	246.00	232.00	14.00
1782.368 ARTIO TOTAL					
RETURN BOND FD-I #1524	10/16/2009	10/18/2010	25,381.00	23,212.00	2,169.00
53.712 BARON ASSET FD	12/01/2004	04/16/2010	2,456.00	2,348.00	108.00
630.343 BARON ASSET FD	07/16/2009	10/18/2010	28,618.00	27,152.00	1,466.00
109.675 COLUMBIA VALUE & RESTRUCTURING FUND #2051					
1203.064 COLUMBIA VALUE & RESTRUCTURING FUND #2051	08/07/2006	04/16/2010	5,028.00	4,631.00	397.00
42.143 DAVIS NY VENTURE FD	01/16/2009	10/18/2010	55,136.00	49,992.00	5,144.00
8.653 DAVIS NY VENTURE FD	05/03/2007	04/16/2010	1,399.00	1,559.00	-160.00
848.894 DAVIS NY VENTURE	05/03/2007	07/16/2010	259.00	320.00	-61.00
124.675 FEDERATED TOTAL	01/16/2009	10/18/2010	27,912.00	30,221.00	-2,309.00
RETURN BOND FUND INSTITUTIONAL SHARES	07/31/1994	02/10/2010	1,364.00	1,288.00	76.00
250.89 FEDERATED TOTAL					
RETURN BOND FUND INSTITUTIONAL SHARES	07/31/1994	06/11/2010	2,772.00	2,592.00	180.00
44.131 FEDERATED TOTAL					
RETURN BOND FUND INSTITUTIONAL SHARES	07/31/1994	07/16/2010	495.00	456.00	39.00
4394.829 FEDERATED TOTAL					
RETURN BOND FUND INSTITUTIONAL SHARES	01/16/2009	10/18/2010	50,233.00	45,575.00	4,658.00
241.036 FIDELITY ADVISOR					
EMERGING MARKET CLASS I FUND #1290	06/11/2008	02/10/2010	4,695.00	4,557.00	138.00
27.715 FIDELITY ADVISOR					
EMERGING MARKET CLASS I FUND #1290	06/11/2008	04/16/2010	609.00	524.00	85.00
12.85 FIDELITY ADVISOR					
EMERGING MARKET CLASS I FUND #1290	06/11/2008	07/16/2010	256.00	243.00	13.00
380.515 FIDELITY ADVISOR					
EMERGING MARKET CLASS I FUND #1290	01/16/2009	10/18/2010	9,083.00	6,374.00	2,709.00
863.445 MFS RESEARCH					
INTERNATIONAL FUND I FUND #899	03/12/2008	02/10/2010	11,518.00	14,480.00	-2,962.00
Totals					

22-3481081

JSA
0F0970 2 000

FEDERAL CAPITAL GAIN DIVIDENDS

=====

LONG-TERM CAPITAL GAIN DIVIDENDS

15% RATE CAPITAL GAIN DIVIDENDS

ASTON FDS MONTAG & CALDWELL GROWTH FUND CL I	178.00
FIDELITY SELECT PORTFOLIOS SELECT GOLD PT FUN	815.00
PIMCO INVESTMENT GRADE CORP BOND FUND CLASS I	2,648.00
TD ASSET MGMT SHORT TERM BOND #4	80.00
VANGUARD GNMA FUND #36	60.00
VANGUARD INTERMEDIATE TERM TREASURY FUND #35	671.00

TOTAL 15% RATE CAPITAL GAIN DIVIDENDS

4,451.00

TOTAL LONG-TERM CAPITAL GAIN DIVIDENDS

4,451.00
=====