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

2010

Department of the Treasury
Internal Revenue Service

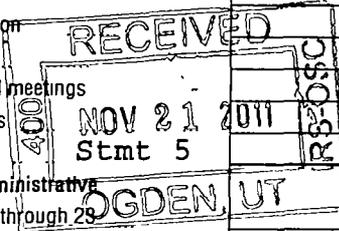
Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements.

For calendar year 2010, or tax year beginning **JUL 1, 2010**, and ending **JUN 30, 2011**

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 Robertshaw Charitable Foundation		A Employer identification number 25-1622184
Number and street (or P O box number if mail is not delivered to street address) 116 North Main Street		Room/suite
City or town, state, and ZIP code Greensburg, PA 15601		B Telephone number (724) 832-7576
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		C If exemption application is pending, check here <input type="checkbox"/> D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 1248734. (Part I, column (d) must be on cash basis)	J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)	E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)</small>		(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				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	2.	2.	2.	Statement 1
	4 Dividends and interest from securities	24380.	24380.	24380.	Statement 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	30859.			
	b Gross sales price for all assets on line 6a 264148.				
	7 Capital gain net income (from Part IV, line 2)		30859.		
	8 Net short-term capital gain			N/A	
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11	55241.	55241.	24382.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.	0.	0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees Stmt 3	3785.	0.	0.	3785.
	c Other professional fees Stmt 4	10566.	10566.	0.	0.
	17 Interest				
	18 Taxes				
	19 Depreciation and depletion				
	20 Occupancy				
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses Stmt 5	12139.	0.	0.	12139.	
24 Total operating and administrative expenses Add lines 13 through 23	26490.	10566.	0.	15924.	
25 Contributions, gifts, grants paid	53395.			53395.	
26 Total expenses and disbursements. Add lines 24 and 25	79885.	10566.	0.	69319.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	<24644.>				
b Net investment income (if negative, enter -0-)		44675.			
c Adjusted net income (if negative, enter -0-)			24382.		



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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value	
Assets	1 Cash - non-interest-bearing	<1.>		
	2 Savings and temporary cash investments	4724.	21640.	21640.
	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			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
11 Investments - land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other Stmt 6	1104827.	1063266.	1227094.	
14 Land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers)	1109550.	1084906.	1248734.	
Liabilities	17 Accounts payable and accrued expenses	2000.	2000.	
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
23 Total liabilities (add lines 17 through 22)	2000.	2000.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. <input checked="" type="checkbox"/>			
	24 Unrestricted	1107550.	1082906.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input type="checkbox"/>			
	27 Capital stock, trust principal, or current funds			
	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	1107550.	1082906.		
31 Total liabilities and net assets/fund balances	1109550.	1084906.		

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	1107550.
2 Enter amount from Part I, line 27a	2	<24644.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1082906.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1082906.

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			
b See Attached Statements			
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 264148.		233289.	30859.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			
b			
c			
d			
e			30859.

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	30859.
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). If (loss), enter -0- in Part I, line 8	3	20228.

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 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	56958.	1115338.	.051068
2008	53093.	1028712.	.051611
2007	79895.	1401327.	.057014
2006	79115.	1392626.	.056810
2005	77669.	1402852.	.055365

2 Total of line 1, column (d)	2	.271868
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	.054374
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	1203783.
5 Multiply line 4 by line 3	5	65454.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	447.
7 Add lines 5 and 6	7	65901.
8 Enter qualifying distributions from Part XII, line 4	8	69319.

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.

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	447.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0.
3	Add lines 1 and 2	3	447.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0.
5	Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-	5	447.
6	Credits/Payments:		
a	2010 estimated tax payments and 2009 overpayment credited to 2010	6a	1895.
b	Exempt foreign organizations - tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	1895.
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> 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	1448.
11	Enter the amount of line 10 to be: Credited to 2011 estimated tax <input checked="" type="checkbox"/> 1448. Refunded <input type="checkbox"/>	11	0.

Part VII-A Statements Regarding Activities

	Yes	No
1a		X
1b		X
1c		X
d		
e		
2		X
3		X
4a		X
4b	N/A	
5		X
6	X	
7	X	
8a		
8b	X	
9		X
10		X

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 instructions)			X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?			X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>N/A</u>		X	
14	The books are in care of ▶ <u>The Foundation</u> Telephone no. ▶ <u>724-832-7576</u> Located at ▶ <u>116 N Main Street, Greensburg PA, Greensburg, PA</u> ZIP+4 ▶ <u>15601</u>			
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	<u>N/A</u>	
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? 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 ▶		Yes	No
		16		X

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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? Organizations relying on a current notice regarding disaster assistance check here <u>N/A</u>	1b	
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 instructions.) <u>N/A</u>	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶ _____		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) <u>N/A</u>	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)? 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 instructions)? Yes No
 Organizations relying on a current notice regarding disaster assistance check here N/A

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). N/A

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? 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? 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.

(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 7		0.	0.	0.

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

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

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

Part VIII

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

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

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

Total number of others receiving over \$50,000 for professional services ▶ 0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 N/A	
2	
3 All other program-related investments. See instructions.	

Total. Add lines 1 through 3 ▶ 0.

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see 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	1198158.
b	Average of monthly cash balances	1b	23957.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1222115.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1222115.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	18332.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1203783.
6	Minimum investment return. Enter 5% of line 5	6	60189.

Part XI Distributable Amount (see 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	60189.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	447.
b	Income tax for 2010. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	447.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	59742.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	59742.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	59742.

Part XII Qualifying Distributions (see 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	69319.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	69319.
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	5	447.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	68872.

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 instructions)

	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				59742.
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2010:				
a From 2005	8596.			
b From 2006	12303.			
c From 2007	12454.			
d From 2008	2133.			
e From 2009	1448.			
f Total of lines 3a through e	36934.			
4 Qualifying distributions for 2010 from Part XII, line 4: ► \$	69319.			
a Applied to 2009, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2010 distributable amount				59742.
e Remaining amount distributed out of corpus	9577.			
5 Excess distributions carryover applied to 2010 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	46511.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7	8596.			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	37915.			
10 Analysis of line 9:				
a Excess from 2006	12303.			
b Excess from 2007	12454.			
c Excess from 2008	2133.			
d Excess from 2009	1448.			
e Excess from 2010	9577.			

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) N/A

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

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

	Tax year	Prior 3 years			(e) Total
	(a) 2010	(b) 2009	(c) 2008	(d) 2007	
2 a 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 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).)

John A. Robertshaw, Jr.

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.

None

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 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:

The Foundation Manager, c/o The Robertshaw Charitable Foundation

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

Brief description of the request and the organization submitted by mail

c Any submission deadlines:

Semi-annually

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

N/A

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 attached schedule					53395.
Total				▶ 3a	53395.
b Approved for future payment None					
Total				▶ 3b	0.

Robertshaw Charitable Foundation

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 FEDERATED STRAT VALUE DIV 661	P	Various	08/25/10
b FEDERATED KAUFMANN FUND	P	Various	08/25/10
c FEDERATED INST TR HI YIELD 900	P	Various	08/25/10
d FEDERATED INTERMED CORP BOND CLASS IS	P	Various	08/25/10
e FEDERATED USGVT 1-3 YR 09	P	Various	08/25/10
f FEDERATED MORTG FD 837	P	Various	08/25/10
g FIDELITY ADVISOR EMERG INST FD	P	Various	08/25/10
h VANGUARD INFLATION PROTECTED FD	P	Various	08/25/10
i HARBOR INTERNATIONAL 411	P	Various	12/16/10
j DODGE & COX	P	Various	02/09/11
k FEDERATED KAUFMANN FUND	P	Various	02/09/11
l FEDERATED INTERMED CORP BOND FD	P	Various	02/09/11
m FEDERATED USGVT SEC 2-5YR 47	P	Various	02/09/11
n FIDELITY ADVISOR INTERNATIONAL DISCOVERY	P	Various	02/09/11
o HARBOR INTERNATIONAL 411	P	Various	02/09/11

(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 4544.		3417.	1127.
b 1130.		1053.	77.
c 1406.		1358.	48.
d 6224.		5957.	267.
e 76498.		76009.	489.
f 5646.		5483.	163.
g 1729.		1637.	92.
h 2229.		2139.	90.
i 10000.		5080.	4920.
j 6778.		6474.	304.
k 54759.		45873.	8886.
l 8346.		8154.	192.
m 6830.		7113.	<283.>
n 12230.		13520.	<1290.>
o 6150.		2999.	3151.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			1127.
b			77.
c			48.
d			267.
e			489.
f			163.
g			92.
h			90.
i			4920.
j			304.
k			** 8886.
l			** 192.
m			** <283.>
n			** <1290.>
o			** 3151.

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
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). If (loss), enter "-0-" in Part I, line 8	3

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 NEUBERGER BERMAN GENESIS	P	Various	02/09/11
b T ROWE PRICE GROWTH STK ADV	P	Various	02/09/11
c SELECTED AMERICAN SHS	P	Various	02/09/11
d VANGUARD PRIMECAP ADMIRAL	P	Various	02/09/11
e FEDERATED USGVT 2-5 SEC	P	Various	06/17/11
f FEDERATED MORTG FD 837	P	Various	06/16/11
g HARBOR INTERNATIONAL 411	P	Various	06/16/11
h T ROWE PRICE VALUE FD - ADV	P	Various	06/16/11
i Capital Gains Dividends			
j			
k			
l			
m			
n			
o			

(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 8210.		4794.	3416.
b 14711.		12971.	1740.
c 1261.		1093.	168.
d 12413.		10285.	2128.
e 5000.		5101.	<101.>
f 5000.		4889.	111.
g 5000.		2478.	2522.
h 5000.		5412.	<412.>
i 3054.			3054.
j			
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			** 3416.
b			** 1740.
c			** 168.
d			** 2128.
e			** <101.>
f			** 111.
g			** 2522.
h			** <412.>
i			3054.
j			
k			
l			
m			
n			
o			

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	30859.
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). If (loss), enter "-0-" in Part I, line 8	3	20228.

Form 990-PF Interest on Savings and Temporary Cash Investments Statement 1

Source	Amount
First Commonwealth Trust	2.
Total to Form 990-PF, Part I, line 3, Column A	2.

Form 990-PF Dividends and Interest from Securities Statement 2

Source	Gross Amount	Capital Gains Dividends	Column (A) Amount
First Commonwealth Trust Account	1163.	0.	1163.
First Commonwealth Trust Account	3054.	3054.	0.
First Commonwealth Trust Account	23217.	0.	23217.
Total to Fm 990-PF, Part I, ln 4	27434.	3054.	24380.

Form 990-PF Accounting Fees Statement 3

Description	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Accounting Fees	3785.	0.	0.	3785.
To Form 990-PF, Pg 1, ln 16b	3785.	0.	0.	3785.

Form 990-PF Other Professional Fees Statement 4

Description	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Investment Management Fees First Commonwealth Trust Department	10566.	10566.	0.	0.
To Form 990-PF, Pg 1, ln 16c	10566.	10566.	0.	0.

Form 990-PF	Other Expenses			Statement	5
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Office & Administrative Fees	12073.	0.	0.	12073.	
Advertising	66.	0.	0.	66.	
To Form 990-PF, Pg 1, ln 23	12139.	0.	0.	12139.	

Form 990-PF	Other Investments		Statement	6
Description	Valuation Method	Book Value	Fair Market Value	
VANGUARD PRIMECAP FD	COST	135846.	187842.	
NEUBERGER BERMAN GEN FD ADVSR CL #990	COST	43004.	64304.	
HARBOR INT'L FD #411 INVSTR CL	COST	113211.	146964.	
DODGE & COX STK FD	COST	84488.	83370.	
SELECTED AMER SHS-S	COST	43359.	47659.	
FEDERATED MTG FD 837	COST	104735.	105928.	
T ROWE PRICE GROWTH STK	COST	80236.	90586.	
T ROWE PRICE VALUE FUND	COST	95139.	102417.	
FEDERATED INSTL TR HI YLD BD#900	COST	29588.	30861.	
FEDERATED INTERMDTE CORP BD CL IS#303	COST	60998.	63092.	
FEDERATED STRATEGIC VAL A #661	COST	60741.	88782.	
FIDELITY ADVSR DISC INTER CL A	COST	54093.	53930.	
FIDELITY ADVISOR SER VIII EMERGING	COST	21669.	22489.	
VANGUARD INFLATION PROTECTED	COST	24579.	26163.	
FEDERATED US GOV SEC 2-5 #47	COST	59789.	58254.	
ARTISIAN MIDCAP	COST	51791.	54453.	
Total to Form 990-PF, Part II, line 13		1063266.	1227094.	

Robersshaw Charitable Foundation Grants Paid

June 2011 Grants	28,355
December 2010 Grants	25,040
Total of attached detail	<u>53,395</u> =====

Robertshaw Charitable Foundation
Grants Awarded
June 2011

1.

Big Brothers Big Sisters of Laurel Region \$2000

Ms. Kelli S. Belanger, MLLS, BSW
106 North Main Street
Greensburg, PA 15601

Towards the School-based mentoring programs in Greensburg Salem School District, specifically to offset costs of volunteer recruitment supplies, program supplies, mentor meals and recognition activity supplies

2.

Economic Growth Connection \$2500

Mr. John Skiavo
40 No. Pennsylvania Avenue
Fifth Floor, Suite 510
Greensburg, PA 15601

Towards the Keystone Innovation Zone Internship Program. The grant would be given to an eligible company/employer

3.

LAIVC, Faith in Action \$2000

P O Box 854
Latrobe, PA 15650

Towards the cost of preparing, printing, and mailing newsletters, brochures and pamphlets to create awareness about the program and to recruit care recipients, volunteers, and donors.

4.

Humane Society of Westmoreland County \$5500

Ms. Kathy Burkley
P O Box 1552
Greensburg, PA 15601

Towards microchips for animals

5.

Laurel Ballet Performing Co \$3480

Ms. Nichole Waugaman-Slavin
813 Highland Avenue
Greensburg, PA 15601

Towards the cost of costumes for "Clara" and the "Soldiers" in the Nutcracker

6.

Seton Hill University	\$2500
Dr. JoAnne Boyle	
Office of the President	
Greensburg, PA 15601	

As part of the Lab Expansion and Modernization Initiative, the grant would go towards the purchase of a Fourier Transform Infrared (FTIR) Spectrophotometer

7.

St. Emma Monastery/Benedictine Nuns	\$8342
Mother Mary Anne Noll, O.S.B.	
1001 Harvey Avenue	
Greensburg, PA 15601	

To cover the cost of the parts for a door keypad security system at the main entrance door (\$3342.) Additional grant (\$5,000) has been awarded towards the 2012 Fundraising dinner.

8.

The Ellis School	\$2033
Ms. Regan Gibney	
6425 Fifth Avenue	
Pittsburgh, PA 15206-4499	

Towards the purchase of new furniture to create a casual learning space

Total: \$28,355

Robertshaw Charitable Foundation

Grants Awarded December 2010

1	Action for Animals 386 Route 217 North P O Box 814 Latrobe, PA 15650-0814	towards the purchase of Pet Kennels and a walk-on scale	\$3000
2	American Red Cross 351 Harvey Avenue, Suite B Greensburg, PA 15601	towards extended care assistance for people affected by natural disasters in Westmoreland County	\$2000
3	Ligonier Valley YMCA 110 W. Church Street Ligonier, PA 15658-1223	towards room renovations	\$2000
4	Loyalhanna Watershed Association 110 Andi Lane Ligonier, PA 15658	towards the development of a strategic plan	\$1000
5	Make A Wish Foundation The Gulf Tower 707 Grant Street, 37th Floor Pittsburgh, PA 15219-1916	towards a "Wish" for a Westmoreland County Child	\$3400
6	Valley Players of Ligonier 208 West Main Street P O Box 127 Ligonier, PA 15658	towards the purchase of materials to construct new Stage Flats	\$1640
7	Westmoreland Arts & Heritage Festival 252 Twin Lakes Road Latrobe, PA 15650	towards new computer equipment	\$2000
8	Westmoreland County Blind Association 911 South Main Street Greensburg, PA 15601	towards a new commercial shredder	\$3000
9	Westmoreland County Food Bank 100 Devonshire Drive Delmont, PA 15626-1607	towards new computer equipment	\$2500
10	Westmoreland Cultural Trust 102 N. Main Street, Suite 232 Greensburg, PA 15601	to upgrade the sound system at the Palace Theatre	\$2000

11	Westmoreland Symphony Orchestra and Academy of Music Greensburg Garden & Civic Center 951 Old Salem Road Greensburg, PA 15601	towards the cost of sectional coaches and the chamber music program	\$2500
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		Total	\$25,040
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