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Form 990-PF

Department of the Treasury
Internal Revenue ServiceReturn 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

9/1/2010

, and ending

8/31/2011

G Check all that apply

Initial return Initial return of a former public charity
 Amended return Address change Name change

Name of foundation

BIRD CHARLES SUMNER FDN TR U/DECL

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

A Employer identification number

04-6093505

BNY Mellon, N A - P O BOX 185

Room/suite

(617) 722-7217

City or town, state, and ZIP code

Pittsburgh

PA

15230-0185

H Check type of organization Section 501(c)(3) exempt private foundation
 Section 4947(a)(1) nonexempt charitable trust Other taxable private foundationI Fair market value of all assets at end
of year (from Part II, col. (c),
line 16) ► \$ 1,993,754

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)
1	Contributions, gifts, grants, etc., received (attach schedule)				
2	Check ► <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments	0	0	0	
4	Dividends and interest from securities	37,614	37,105	0	
5 a	Gross rents				
b	Net rental income or (loss)	0			
6 a	Net gain or (loss) from sale of assets not on line 10	167,947			
b	Gross sales price for all assets on line 6a	691,674			
7	Capital gain net income (from Part IV, line 2)		167,947		
8	Net short-term capital gain			0	
9	Income modifications				
10 a	Gross sales less returns and allowances	0			
b	Less Cost of goods sold	0			
c	Gross profit or (loss) (attach schedule)	0			
11	Other income (attach schedule)	0	0	0	
12	Total. Add lines 1 through 11	205,561	205,052	0	
13	Compensation of officers, directors, trustees, etc	5,636	4,678		958
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16 a	Legal fees (attach schedule)	0	0	0	0
b	Accounting fees (attach schedule)	0	0	0	0
c	Other professional fees (attach schedule)	0	0	0	0
17	Interest				
18	Taxes (attach schedule) (see page 14 of the instructions)	2,169	627	0	0
19	Depreciation (attach schedule) and depletion	0	0	0	
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses (attach schedule)	35	0	0	35
24	Total operating and administrative expenses.	7,840	5,305	0	993
	Add lines 13 through 23	95,000			95,000
25	Contributions, gifts, grants paid	102,840	5,305	0	95,993
26	Total expenses and disbursements Add lines 24 and 25				
27	Subtract line 26 from line 12	102,721			
a	Excess of revenue over expenses and disbursements				
b	Net investment income (if negative, enter -0-)	199,747			
c	Adjusted net income (if negative, enter -0-)			0	

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

(HTA)

Form 990-PF (2010)

NE
9ENVELOPE
POSTMARK DATE JAN 13 2012

Revenue

Operating and Administrative Expenses

JAN 23 2012

SCANNED

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		0	
	2	Savings and temporary cash investments	30,381	62,856	62,856
	3	Accounts receivable ►	0		
		Less allowance for doubtful accounts ►	0	0	0
	4	Pledges receivable ►	0		
		Less allowance for doubtful accounts ►	0	0	0
	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) ►	0	0	0
		Less allowance for doubtful accounts ►	0	0	0
	8	Inventories for sale or use		0	
	9	Prepaid expenses and deferred charges		0	
	10	a Investments—U S and state government obligations (attach schedule)		0	0
		b Investments—corporate stock (attach schedule)		0	0
		c Investments—corporate bonds (attach schedule)		0	0
Liabilities	11	Investments—land, buildings, and equipment basis ►	0		
		Less accumulated depreciation (attach schedule) ►	0	0	0
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	1,680,448	1,750,694	1,930,898
	14	Land, buildings, and equipment basis ►	0		
		Less accumulated depreciation (attach schedule) ►	0	0	0
	15	Other assets (describe ►)	0	0	0
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	1,710,829	1,813,550	1,993,754
	17	Accounts payable and accrued expenses		0	
	18	Grants payable			
Net Assets or Fund Balances	19	Deferred revenue		0	
	20	Loans from officers, directors, trustees, and other disqualified persons	0	0	
	21	Mortgages and other notes payable (attach schedule)	0	0	
	22	Other liabilities (describe ►)	0	0	
	23	Total liabilities (add lines 17 through 22)	0	0	
		Foundations that follow SFAS 117, check here ► <input type="checkbox"/>			
		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 ► <input checked="" type="checkbox"/>			
		and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	1,710,829	1,813,550	
	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)	1,710,829	1,813,550	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	1,710,829	1,813,550	

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	1,710,829
2	Enter amount from Part I, line 27a	2	102,721
3	Other increases not included in line 2 (itemize) ►	3	0
4	Add lines 1, 2, and 3	4	1,813,550
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	1,813,550

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 Attached Statement				
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 0	0	0	0	
b 0	0	0	0	
c 0	0	0	0	
d 0	0	0	0	
e 0	0	0	0	
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 0	0	0	0	
b 0	0	0	0	
c 0	0	0	0	
d 0	0	0	0	
e 0	0	0	0	
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	167,947
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	6,130

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	80,791	1,936,070	0.041729
2008	125,139	1,762,940	0.070983
2007	125,882	2,510,732	0.050138
2006	101,213	2,551,866	0.039662
2005	51,897	2,051,383	0.025299

2 Total of line 1, column (d)

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

4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5

5 Multiply line 4 by line 3

6 Enter 1% of net investment income (1% of Part I, line 27b)

7 Add lines 5 and 6

8 Enter qualifying distributions from Part XII, line 4

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18

2	0.227811
3	0.045562
4	2,125,255
5	96,831
6	1,997
7	98,828
8	95,993

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)1 a 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 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

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-)

3 Add lines 1 and 2

4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

5 **Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-

6 Credits/Payments

a 2010 estimated tax payments and 2009 overpayment credited to 2010

6a 1,210

b Exempt foreign organizations—tax withheld at source

6b

c Tax paid with application for extension of time to file (Form 8868)

6c 0

d Backup withholding erroneously withheld

6d

7 Total credits and payments Add lines 6a through 6d

8 Enter any **penalty** for underpayment of estimated tax. Check here if Form 2220 is attached9 **Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed**10 **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid**11 Enter the amount of line 10 to be **Credited to 2011 estimated tax** ► 0

Refunded ►

7	1,210
8	0
9	2,785
10	0
11	0

Part VII-A Statements Regarding Activities

1 a 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?

	Yes	No
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
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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
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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 ► \$ _____

2	X
---	---

e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ► \$ _____

3	X
---	---

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

4a	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*

4b	N/A
----	-----

4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

5	X
---	---

b If "Yes," has it filed a tax return on Form 990-T for this year?

6	X
---	---

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?

7	X
---	---

If "Yes," attach the statement required by General Instruction T

8b	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?

9	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*

10	X
----	---

8 a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ► MA

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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*

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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*

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10 Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*

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? Website address ► N/A	13	X
14	The books are in care of ► BNY MELLON, N A Located at ► P.O. BOX 185, PITTSBURGH, PA	Telephone no ► (617) 722-7217	ZIP+4 ► 15230-0185
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	N/A
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 ►	16	Yes 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)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(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	1b	X
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 ► 20_____, 20_____, 20_____, 20_____		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 22 of the instructions)	2b	N/A
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20_____, 20_____, 20_____		
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)	3b	N/A
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	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>		5b	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? If "Yes," attach the statement required by Regulations section 53 4945–5(d) N/A	<input type="checkbox"/> Yes <input type="checkbox"/> No		
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870		6b	X
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?		7b	N/A

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
BNY MELLON, N A P O BOX 185 PITTSBURGH PA 15230-0185	TRUSTEE SEE ATTACHED	17,085	NONE	NONE
BNY MELLON, N A P O BOX 185 PITTSBURGH PA 15230-0185	FEE REIMBURSEMENT	-11,449	N/A	N/A
	00	0	0	0
	00	0	0	0

2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). If none, enter "NONE."

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

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

►

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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		0
		0
		0
		0
		0
		0
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 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	
	0

Total. Add lines 1 through 3 ► 0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities	1a	2,081,392
b	Average of monthly cash balances	1b	76,227
c	Fair market value of all other assets (see page 25 of the instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	2,157,619
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	
3	Subtract line 2 from line 1d	3	2,157,619
4	Cash deemed held for charitable activities Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions)	4	32,364
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,125,255
6	Minimum investment return. Enter 5% of line 5	6	106,263

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	106,263
2a	Tax on investment income for 2010 from Part VI, line 5	2a	3,995
b	Income tax for 2010 (This does not include the tax from Part VI)	2b	0
c	Add lines 2a and 2b	2c	3,995
3	Distributable amount before adjustments Subtract line 2c from line 1	3	102,268
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	102,268
6	Deduction from distributable amount (see page 25 of the instructions)	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	102,268

Part XII Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes	1a	95,993
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1b	0
b	Program-related investments—total from Part IX-B		
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	3a	
a	Suitability test (prior IRS approval required)	3b	0
b	Cash distribution test (attach the required schedule)		
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	95,993
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	95,993

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				102,268
2 Undistributed income, if any, as of the end of 2010			90,575	
a Enter amount for 2009 only		0		
b Total for prior years 20____, 20____, 20____				
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	0			
4 Qualifying distributions for 2010 from Part XII, line 4 ► \$ 95,993			90,575	
a Applied to 2009, but not more than line 2a		0		
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)				
c Treated as distributions out of corpus (Election required—see page 26 of the instructions)	0			
d Applied to 2010 distributable amount				5,418
e Remaining amount distributed out of corpus	0			0
5 Excess distributions carryover applied to 2010 (If an amount appears in column (d), the same amount must be shown in column (a))	0			
6 Enter the net total of each column as indicated below:	0			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
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				
d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions			0	
e Undistributed income for 2009 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions				0
f Undistributed income for 2010 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011				96,850
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)				
8 Excess distributions carryover from 2005 not applied on line 5 or line 7 (see page 27 of the instructions)	0			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2006	0			
b Excess from 2007	0			
c Excess from 2008	0			
d Excess from 2009	0			
e Excess from 2010	0			

Part XIV Private Operating Foundations (see page 27 of the 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				<input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)		
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				0		
c	Qualifying distributions from Part XII, line 4 for each year listed				0		
d	Amounts included in line 2c not used directly for active conduct of exempt activities				0		
e	Qualifying distributions made directly for active conduct of exempt activities				0		
	Subtract line 2d from line 2c				0		
3	Complete 3a, b, or c for the alternative test relied upon				0		
a	"Assets" alternative test—enter				0		
(1)	Value of all assets				0		
(2)	Value of assets qualifying under section 4942(j)(3)(B)(i)				0		
b	"Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed				0		
c	"Support" alternative test—enter				0		
(1)	Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)				0		
(2)	Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)				0		
(3)	Largest amount of support from an exempt organization				0		
(4)	Gross investment income				0		

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))

NONE

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 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

BRIAN COLLINS MELLON TR OF NE

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

CONTACT BRIAN P. COLLINS (617) 722-7217

c Any submission deadlines

CONTACT BRIAN P. COLLINS (617) 722-7217

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

CONTACT BRIAN P. COLLINS (617) 722-7217

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 Statement				
Total			► 3a	95,000
b Approved for future payment NONE				
Total			► 3b	0

Part XVI-A | Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

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

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?	Yes	No
a	Transfers from the reporting foundation to a noncharitable exempt organization of	1a(1)	X
	(1) Cash	1a(2)	X
	(2) Other assets		
b	Other transactions	1b(1)	X
	(1) Sales of assets to a noncharitable exempt organization	1b(2)	X
	(2) Purchases of assets from a noncharitable exempt organization	1b(3)	X
	(3) Rental of facilities, equipment, or other assets	1b(4)	X
	(4) Reimbursement arrangements	1b(5)	X
	(5) Loans or loan guarantees	1b(6)	X
	(6) Performance of services or membership or fundraising solicitations	1c	X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees		
d	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received		

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

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.

Sign
Here

any

12/16/2011

VICE PRESIDENT

1. Date

Signature of officer or trustee

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check <input checked="" type="checkbox"/> if self-employed	PTIN
	Shawn P. Hanlon	 CPA	12/16/2011		P00965923
	Firm's name ► PRICEWATERHOUSECOOPERS LLP		Firm's EIN ► 13-4008324		
Firm's address ► 600 GRANT STREET, PITTSBURGH, PA 15219		Phone no (412) 355-6000			

ACCOUNT NO	ACCOUNT NAME	CUSIP ID	ASSET SHORT NAME	SHARES	MARKET VALUE	FEDERAL TAX COST
10144801008	BIRD CHARLES SU 05569M103		BNY MELLON LARGE CAP STK-M	44,760 37	364,349 44	359,000 00
10144801008	BIRD CHARLES SU 05569M301		BNY MELLON INCOME STOCK-M	23,956 66	150,447 84	109,721 51
10144801008	BIRD CHARLES SU 05569M442		BNY MELLON SM/MID CAP-M	3,211 30	42,196 53	50,000 00
10144801008	BIRD CHARLES SU 05569M475		BNY MELLON FOC-EQ OPP-M	10,724 92	129,128.11	108,000 00
10144801008	BIRD CHARLES SU 05569M509		BNY MELLON MID CAP STOCK-M	8,737 13	99,690.74	83,714 31
10144801008	BIRD CHARLES SU 05569M780		BNY MELLON S/T US GOV SECS-M	10,597 08	130,344 18	130,455 90
10144801008	BIRD CHARLES SU 05569M830		BNY MELLON BOND FUND-M	23,802 46	318,477.04	288,316 69
10144801008	BIRD CHARLES SU 05569M855		BNY MELLON EMERGING MKTS-M	20,215 75	215,297 83	172,000 00
10144801008	BIRD CHARLES SU 261986632		DREYFUS DIVERSIFIED INTL-I	20,864 84	202,806 30	171,461 23
10144801008	BIRD CHARLES SU 26200C403		DREYFUS OPPORTUNISTIC S/C	943.47	23,492 45	21,614 94
10144801008	BIRD CHARLES SU 46428R107		ISHARES S&P GSCI COMMODITY-I	834 00	28,848.06	22,321 11
10144801008	BIRD CHARLES SU 48121A670		HIGHBRIDGE DYNAMIC COMM STRA	683 99	14,268 14	15,000 00
10144801008	BIRD CHARLES SU 633872T885		ASG GLOBAL ALTERNATIVES FUND	3,659 65	38,572 73	40,000 00
10144801008	BIRD CHARLES SU 78356A160		RYDEX MANAGED FUTURES STRATE	1,311 35	33,151 00	35,000 00
10144801008	BIRD CHARLES SU 86271F578		DREYFUS SELECT MGER S/C GR-I	1,660 31	27,063 15	30,500 00
10144801008	BIRD CHARLES SU 86271F677		DREYFUS SELECT MGER S/C VL-I	1,420 14	26,102 30	23,588 64
10144801008	BIRD CHARLES SU 86271F727		DREYFUS US EQUITY FUND-I	6,419 40	86,661 91	90,000 00
10144801008	BIRD CHARLES SU 991061052		CRA (BNY MELLON, N.A., MEMBE	57,014 96	57,014 96	57,014 96
10144801008	BIRD CHARLES SU 991061052		CRA (BNY MELLON, N.A., MEMBE	5,840 98	5,840 98	5,840 98

TOTAL FOR ACCT#10144801008

1,993,753 69 1,813,550 27

**Attachment to Form 990PF Part VIII, Column (b) Title and average hours per week
devoted to position**

As Trustee, BNY Mellon, N A. provides administrative services such as acting as investment manager for the named organization. These services require numerous individual bank employees' involvement in the activities of the organization and thus cannot be quantified on an hourly basis. Therefore, the Trustee's fees are not based upon an hourly basis but are calculated based upon factors such as the market value of the account and in accordance with our agreement with the client.

BIRD CHARLES SUMNER FDN TR U/DECL

04-6093505 Page 1 of 7

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year**Recipient(s) paid during the year**

Name

EAGLEBROOK SCHOOL

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 20,000
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Name

NEW BRITAIN MUSEUM OF AMERICAN ART

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 2,000
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Name

PROVINCETOWN ARTS PRESS, INC

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 1,000
---	-----------------

Name

TRURO CONSERVATION TRUST

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 1,000
---	-----------------

Name

TRURO CENTER FOR THE ARTS

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 1,000
---	-----------------

Name

PROVINCETOWN ART ASSOCIATION AND MUSEUM, INC

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 2,000
---	-----------------

BIRD CHARLES SUMNER FDN TR U/DECL

04-6093505 Page 2 of 7

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year**Recipient(s) paid during the year**

Name

PROVINCETOWN INTERNATIONAL FILM FESTIVAL, INC

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 2,000
---	-----------------

Name

LOWER CAPE COMMUNICATIONS, INC

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 2,000
---	-----------------

Name

AMERICAN FRIENDS OF GEORGIA, INC

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 1,000
---	-----------------

Name

WELLFLEET PRESERVATION HALL, INC

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 1,000
---	-----------------

Name

PROVINCETOWN TENNESSEE WILLIAMS THEATRE FESTIVAL, INC

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 1,000
---	-----------------

Name

WGBH--FOR WCAI 90 1 FM

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 2,000
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BIRD CHARLES SUMNER FDN TR U/DECL

04-6093505 Page 3 of 7

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year**Recipient(s) paid during the year**

Name

FRIENDS OF THE TRURO LIBRARIES, INC

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 1,000
---	-----------------

Name

SUPPORTERS OF THE PROVINCETOWN PUBLIC LIBRARY, INC

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 2,000
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Name

THE NORMAN MAILER WRITERS COLONY INC

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 1,000
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Name

MANOMET CENTER FOR CONSERVATION SCIENCES

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 1,000
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Name

LLOYD CENTER FOR ENVIRONMENTAL STUDIES, INC

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 1,000
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Name

CONWAY SCHOOL OF LANDSCAPE DESIGN

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 10,500
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BIRD CHARLES SUMNER FDN TR U/DECL

04-6093505 Page 4 of 7

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year**Recipient(s) paid during the year**

Name

WESTPORT ART GROUP

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 1,000
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Name

18TH STREET ARTS CENTER

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 2,000
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Name

FRESH ENERGY

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 3,000
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Name

FRIENDS SCHOOL OF MINNESOTA

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 1,500
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Name

REDWOOD LIBRARY AND ATHENAEUM

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 1,500
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Name

NEWPORT HOSPITAL FOUNDATION

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 5,000
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BIRD CHARLES SUMNER FDN TR U/DECL

04-6093505 Page 5 of 7

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year**Recipient(s) paid during the year**

Name

STAR KIDS SCHOLARSHIP PROGRAM

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 3,000
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Name

OLIVER HAZARD PERRY RHODE ISLAND

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 5,500
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Name

WRNI

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 1,000
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Name

THE STANFORD WHITE CASINO THEATRE

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 1,000
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Name

PATAGONIA CREATIVE ARTS ASSOCIATION

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 1,500
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Name

PATAGONIA COMMUNITY GARDENS

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 1,500
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BIRD CHARLES SUMNER FDN TR U/DECL

04-6093505 Page 6 of 7

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year**Recipient(s) paid during the year**

Name

FOUNDATION FOR PRESERVATION OF HONEY BEES, INC

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 3,990
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Name

PLAN INTERNATIONAL USA

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 1,605
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Name

UNITY SCHOOL OFCHRISTIANITY FOR SILENT UNITY

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 1,230
---	-----------------

Name

THE TRUSTEES OF RESERVATIONS FOR APPLETON FARMS

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 1,820
---	-----------------

Name

U S NATIONAL ARBORETUM

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 1,000
---	-----------------

Name

MINERAL SPRINGS FOUNDATION

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 1,785
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BIRD CHARLES SUMNER FDN TR U/DECL

04-6093505 Page 7 of 7

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year**Recipient(s) paid during the year**

Name

TRANSITION COLORADO

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 1,785
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Name

THE BUSINESS OF ART CENTER

Street

City	State	Zip Code	Foreign Country
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Relationship NONE	Foundation Status PUBLIC		
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Purpose of grant/contribution CHARITABLE	Amount 1,785
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Name

Street

City	State	Zip Code	Foreign Country
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Relationship	Foundation Status		
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Purpose of grant/contribution	Amount 0
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Name

Street

City	State	Zip Code	Foreign Country
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Relationship	Foundation Status		
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Purpose of grant/contribution	Amount 0
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Name

Street

City	State	Zip Code	Foreign Country
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Relationship	Foundation Status		
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Purpose of grant/contribution	Amount 0
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Name

Street

City	State	Zip Code	Foreign Country
------	-------	----------	-----------------

Relationship	Foundation Status		
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Purpose of grant/contribution	Amount 0
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Line 6 (990-PF) - Gain/Loss from Sale of Assets Other Than Inventory

Index	Check "X" if Sale of Security	Description	CUSIP #	Purchaser	Check "X" if Purchaser is a Business	Date Acquired	Acquisition Method	Date Sold	Gross Sales Price	Cost or Other Basis	Valuation Method	Totals	
												Securities	
												Gross Sales	Cost, Other Basis and Expenses
												691,674	523,727
												0	0
													167,947
1	X	BNY MELLON INCOME STOCK	05568M301			7/9/2009			230,000	152,446			77,554
2	X	BNY MELLON INCOME STOCK	05568M301			7/9/2009			170,000	116,557			53,443
3	X	BNY MELLON MID CAP STOCK	05568M509			11/20/2001			4125/2011	32,014	26,193		5,821
4	X	BNY MELLON MID CAP STOCK	05568M509			12/6/2007			4125/2011	11,076	10,391		685
5	X	BNY MELLON MID CAP STOCK	05568M509			7/16/2002			4125/2011	26,910	19,551		7,359
6	X	BNY MELLON SIT US GOV SE	05568M780			7/7/2010			6/8/2011	30,000	30,244		-244
7	X	BNY MELLON BOND FUND-M	05568M830			4/30/1983			4125/2011	54,087	50,660		3,427
8	X	BNY MELLON BOND FUND-M	05568M830			4/30/1983			4125/2011	6,441	6,074		367
9	X	BNY MELLON BOND FUND-M	05568M830			12/16/2010			4125/2011	642	632		10
10	X	BNY MELLON BOND FUND-M	05568M830			3/21/2006			4125/2011	23,829	22,201		1,628
11	X	BNY MELLON BOND FUND-M	05568M830			3/21/2006			6/8/2011	60,000	55,229		4,771
12	X	DREYFUS DIVERSIFIED INTL	2611986632			7/8/2009			4125/2011	19,000	13,913		5,087
13	X	DREYFUS OPPORTUNISTIC S	26200C403			12/14/2010			4125/2011	731	666		65
14	X	DREYFUS OPPORTUNISTIC S	26200C403			7/7/2010			4125/2011	13,269	9,385		3,884
15	X	DREYFUS SELECT MGER S/C	862271F677			12/31/2010			4125/2011	2,349	2,174		175
16	X	DREYFUS SELECT MGER S/C	862271F677			7/7/2010			4125/2011	9,651	7,411		2,240

Line 18 (990-PF) - Taxes

	Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1	FOREIGN TAX WITHHELD		627	627	
2	PRIOR YEAR EXCISE TAX PAID		332		
3	ESTIMATED EXCISE PAYMENTS		1,210		
4					
5					
6					
7					
8					
9					
10					

Line 23 (990-PF) - Other Expenses

	Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1	Amortization See attached statement	0	0	0	0
2	STATE AG FEES	35		0	35
3					
4					
5					
6					
7					
8					
9					
10					

Part II, Line 13 (990-PF) - Investments - Other

	Item or Category	Basis of Valuation	Book Value Beg. of Year	Book Value End of Year	FMV End of Year
1	OTHER ASSETS		1,680,448	1,750,694	1,930,898
2					
3					
4					
5					
6					
7					
8					
9					
10					

Part IV (990-PF) - Capital Gains and Losses for Tax on Investment Income

		Amount	1,675	0	523,727	166,272	0	0	0	166,272
	Kind(s) of Property Sold	CUSIP #	How Acquired	Date Sold	Gross Sales Price	Depreciation Allowed	Cost or Other Basis Plus Expense of Sale	Gain or Loss	Adjusted Basis as of 12/31/69	Excess of FMV Over Adj Basis
1	BNY MELLON INCOME STOCK-M	05569M301	7/9/2009	4/25/2011	230,000	0	152,446	77,554		77,554
2	BNY MELLON INCOME STOCK-M	05569M301	7/9/2009	6/8/2011	170,000	0	116,557	53,443	0	53,443
3	BNY MELLON MID CAP STOCK-M	05569M509	11/20/2001	4/25/2011	32,014	0	26,193	5,821	0	5,821
4	BNY MELLON MID CAP STOCK-M	05569M509	12/6/2007	4/25/2011	11,076	0	10,391	685	0	685
5	BNY MELLON MID CAP STOCK-M	05569M509	7/16/2002	4/25/2011	26,910	0	19,551	7,359	0	7,359
6	BNY MELLON SIT US GOV SECS-M	05569M780	7/7/2010	6/8/2011	30,000	0	30,244	-244	0	-244
7	BNY MELLON BOND FUND-M	05569M830	4/30/1983	4/25/2011	54,087	0	50,660	3,427	0	3,427
8	BNY MELLON BOND FUND-M	05569M830	4/30/1983	4/25/2011	6,441	0	6,074	367	0	367
9	BNY MELLON BOND FUND-M	05569M830	12/16/2010	4/25/2011	642	0	632	10	0	10
10	BNY MELLON BOND FUND-M	05569M830	3/21/2006	4/25/2011	23,829	0	22,201	1,628	0	1,628
11	BNY MELLON BOND FUND-M	05569M830	3/21/2006	6/8/2011	60,000	0	55,229	4,771	0	4,771
12	DREYFUS DIVERSIFIED INTL-I	261986632	7/8/2009	4/25/2011	19,000	0	13,913	5,087	0	5,087
13	DREYFUS OPPORTUNISTIC S/C	26200C403	12/14/2010	4/25/2011	731	0	666	65	0	65
14	DREYFUS OPPORTUNISTIC S/C	26200C403	7/7/2010	4/25/2011	13,269	0	9,385	3,884	0	3,884
15	DREYFUS SELECT MGER SIC VL-I	86271F677	12/31/2010	4/25/2011	2,349	0	2,174	175	0	175
16	DREYFUS SELECT MGER SIC VL-I	86271F677	7/7/2010	4/25/2011	9,651	0	7,411	2,240	0	2,240

Part VIII, Line 1 (990-PF) - Compensation of Officers, Directors, Trustees and Foundation Managers

	Name	Check "X" if Business	Street	City	State	Zip Code	Foreign Country	Title	Average Hours	Compensation
1	BNY MELLON, N.A.		PO BOX 185	PITTSBURGH	PA	15230-0185		SEE ATT A		17,085
2	BNY MELLON, N.A.		PO BOX 185	PITTSBURGH	PA	15230-0185		SEE ATT A		-11,449
3										
4										
5										
6										
7										
8										
9										
10										

5,636

Part

	Benefits	Expense Account	Explanation
1	NONE	NONE	
2	N/A	N/A	
3			
4			
5			
6			
7			
8			
9			
10			

Part VI, Line 6a (990-PF) - Estimated Tax Payments

	Date	Amount
1 Credit from prior year return	1	
2 First quarter estimated tax payment	1/11/2011	302
3 Second quarter estimated tax payment	2/9/2011	403
4 Third quarter estimated tax payment	5/10/2011	505
5 Fourth quarter estimated tax payment	5	
6 Other payments	6	1,210
7 Total	7	1,210

Part XIII, Line 2a, Column C (990-PF) - Prior Year Undistributed Income

1	Distributable amounts for 2009 that remained undistributed at the beginning of the 2010 tax year	1	90,575
2		2	
3		3	
4		4	
5		5	
6		6	
7		7	
8		8	
9		9	
10	Total	10	90,575