



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



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 12/01, 2010, and ending 11/30, 2011

G Check all that apply: ☐ Initial return ☐ Initial Return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name change

STEPHEN H. STURGES & ROSE P. STURGES
CHARITABLE TRUST
P.O. BOX 4997
YUMA, AZ 85364

A Employer identification number

86-0427923

B Telephone number (see the instructions)

(928) 783-8321

C If exemption application is pending, check here ☐D 1 Foreign organizations, check here. ☐2 Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year
(from Part II, column (c), line 16)

\$ 4,401,852.

J Accounting method: ☐ Cash ☒ Accrual
☐ Other (specify) _____

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

Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see the instructions).)

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

REVENUE	1 Contributions, gifts, grants, etc., received (att sch)				
	2 Ck ☒ if the foundn is not req to att Sch B				
	3 Interest on savings and temporary cash investments	82.	82.	82.	
	4 Dividends and interest from securities	116,749.	116,749.	116,749.	
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain/(loss) from sale of assets not on line 10	12,369.			
	b Gross sales price for all assets on line 6a	1,227,922.			
	7 Capital gain net income (from Part IV, line 2)		12,369.		
	8 Net short-term capital gain			0.	
9 Income modifications					
10a Gross sales less returns and allowances					
b Less: Cost of goods sold					
c Gross profit/(loss) (att sch)					
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	129,200.	129,200.	116,831.		
13 Compensation of officers, directors, trustees, etc	6,000.				
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees (attach schedule)					
b Accounting fees (attach sch) See St. 1	5,000.	2,500.	2,500.		
c Other prof fees (attach sch) See St. 2	35,395.	17,697.	17,697.		
17 Interest					
18 Taxes (attach schedule)(see instr)					
19 Depreciation (attach sch) and depletion	478.				
20 Occupancy	1,695.	847.	848.		
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses (attach schedule) See Statement 3	31,533.	27,667.		3,863.	
24 Total operating and administrative expenses. Add lines 13 through 23	80,101.	48,711.		24,908.	
25 Contributions, gifts, grants paid Part XV	202,000.			202,000.	
26 Total expenses and disbursements. Add lines 24 and 25	282,101.	48,711.	0.	226,908.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-152,901.				
b Net investment income (if negative, enter -0-)		80,489.			
c Adjusted net income (if negative, enter -0-)			116,831.		

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
ASSETS	1 Cash — non-interest-bearing			
	2 Savings and temporary cash investments	127,386.	27,672.	27,672.
	3 Accounts receivable			
	Less: allowance for doubtful accounts			
	4 Pledges receivable			
	Less: allowance for doubtful accounts			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions).			
	7 Other notes and loans receivable (attach sch)			
	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 (attach schedule)			
	b Investments — corporate stock (attach schedule) Statement 4	2,248,842.	2,053,545.	2,259,593.
	c Investments — corporate bonds (attach schedule) Statement 5	1,515,660.	1,678,303.	1,721,892.
	11 Investments — land, buildings, and equipment: basis			
LIABILITIES	Less: accumulated depreciation (attach schedule)			
	12 Investments — mortgage loans			
	13 Investments — other (attach schedule) Statement 6	414,103.	389,651.	390,041.
	14 Land, buildings, and equipment: basis	3,832.		
	Less: accumulated depreciation (attach schedule) See Stmt 7	3,618.		
	15 Other assets (describe See Statement 8)	692.	214.	214.
	16 Total assets (to be completed by all filers — see instructions. Also, see page 1, item I)	4,306,683.	4,151,825.	4,401,852.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
NET ASSETS OR FUND BALANCES	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe)	1,957.		
	23 Total liabilities (add lines 17 through 22)	1,957.	0.	
	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ☒			
	27 Capital stock, trust principal, or current funds	4,304,726.	4,151,825.	
FOUNDATIONS	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see the instructions)	4,304,726.	4,151,825.	
	31 Total liabilities and net assets/fund balances (see the instructions)	4,306,683.	4,151,825.	

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	4,304,726.
2 Enter amount from Part I, line 27a	2	-152,901.
3 Other increases not included in line 2 (itemize)	3	
4 Add lines 1, 2, and 3	4	4,151,825.
5 Decreases not included in line 2 (itemize)	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	4,151,825.

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 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1 a See Statement 9				
b				
c				
d				
e				

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

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

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7		2	12,369.
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 the instructions). If (loss), enter -0- in Part I, line 8		3	-22,568.

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 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 (column (b) divided by column (c))
2009	199,135.	4,383,986.	0.045423
2008	192,432.	4,149,678.	0.046373
2007	254,403.	5,018,011.	0.050698
2006	258,213.	5,345,027.	0.048309
2005	311,179.	5,159,800.	0.060308

2 Total of line 1, column (d).	2	0.251111
3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.050222
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	4,563,209.
5 Multiply line 4 by line 3	5	229,173.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	805.
7 Add lines 5 and 6	7	229,978.
8 Enter qualifying distributions from Part XII, line 4	8	226,908.

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 V Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 – see 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 instr.)		
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1 1,610.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (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 1,610.
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 1,610.
6 Credits/Payments:		
a 2010 estimated tax pmts and 2009 overpayment credited to 2010	6a 2,440.	
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 2,440.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9 0.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10 830.	
11 Enter the amount of line 10 to be: Credited to 2011 estimated tax 830. Refunded	11 0.	

Part VI Statements Regarding Activities

	Yes	No
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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?		X
If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation \$ 0. (2) On foundation managers \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0.		
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.		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		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If 'Yes,' attach the statement required by General Instruction T		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?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV	X	
8 a Enter the states to which the foundation reports or with which it is registered (see the instructions) AZ		
b If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If 'No,' attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV)? If 'Yes,' complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses		X

BAA

Form 990-PF (2010)

Part VII 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)	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: STURGES CHARITABLE TRUST Located at: 833 PLAZA CIRCLE, STE 200 YUMA AZ Telephone no.: (928) 783-8321 ZIP + 4: 85365			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here: N/A 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 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	No X

Part VIII Statements Regarding Activities for Which Form 4720 May Be Required

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes	☒ No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes	☒ No
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes	☒ No
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes	☒ No
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes	☒ No
(6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes	☒ No
b If any answer is 'Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see the instructions)? Organizations relying on a current notice regarding disaster assistance check here:	1b	N/A
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? If 'Yes,' list the years: 20__, 20__, 20__, 20__	☐ Yes	☒ No
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 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__, 20__		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes	☒ No
b If 'Yes,' did it have excess business holdings in 2010 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2010.)	3b	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

BAA

Form 990-PF (2010)

Part VII Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to:(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?. ☐ Yes ☒ No(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) ☐ Yes ☒ No(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No**b** If any answer is 'Yes' to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?Organizations relying on a current notice regarding disaster assistance check here ☐**c** If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☒ No

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

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

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement 10		6,000.	0.	0.

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

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

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

0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services (see instructions). If none, enter 'NONE.'

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services		0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 NONE	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

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	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

BAA

Form 990-PF (2010)

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	4,555,104.
b Average of monthly cash balances	1b	77,382.
c Fair market value of all other assets (see instructions)	1c	214.
d Total (add lines 1a, b, and c)	1d	4,632,700.
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	4,632,700.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	69,491.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,563,209.
6 Minimum investment return. Enter 5% of line 5	6	228,160.

Part XIII 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	228,160.
2a Tax on investment income for 2010 from Part VI, line 5	2a	1,610.
b Income tax for 2010 (This does not include the tax from Part VI.)	2b	
c Add lines 2a and 2b	2c	1,610.
3 Distributable amount before adjustments. Subtract line 2c from line 1.	3	226,550.
4 Recoveries of amounts treated as qualifying distributions	4	
5 Add lines 3 and 4	5	226,550.
6 Deduction from distributable amount (see instructions)	6	
7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	226,550.

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	226,908.
b Program-related investments — total from Part IX-B	1b	
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
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	226,908.
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 instructions)	5	
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	226,908.

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.				226,550.
2 Undistributed income, if any, as of the end of 2010:				
a Enter amount for 2009 only			193,357.	
b Total for prior years: 20 __, 20 __, 20 __		0.		
3 Excess distributions carryover, if any, to 2010:				
a From 2005.				
b From 2006.				
c From 2007.				
d From 2008.				
e From 2009.				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2010 from Part XII, line 4: ► \$ 226,908.				
a Applied to 2009, but not more than line 2a			193,357.	
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.				33,551.
e Remaining amount distributed out of corpus	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.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount — see instructions		0.		
e Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount — see instructions.			0.	
f Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011.				192,999.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7 (see instructions).	0.			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a.	0.			
10 Analysis of line 9:				
a Excess from 2006.				
b Excess from 2007				
c Excess from 2008				
d Excess from 2009				
e Excess from 2010				

Part XIV Private Operating Foundations (see 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)

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

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

Part XV Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year – see 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 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:

See Statement 11

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

See Statement for Line 2a

c Any submission deadlines:

See Statement for Line 2a

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

See Statement for Line 2a

Part VII **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)				
<i>a Paid during the year</i> See Statement 12				
Total			3a	202,000.
<i>b Approved for future payment</i>				
Total			3b	

Depreciation and Amortization (Including Information on Listed Property)

OMB No. 1545-0172

2010Department of the Treasury
Internal Revenue Service (99)

▶ See separate instructions. ▶ Attach to your tax return.

Attachment
Sequence No **67**Name(s) shown on return **STEPHEN H. STURGES & ROSE P. STURGES
CHARITABLE TRUST**Identifying number
86-0427923

Business or activity to which this form relates

Form 990/990-PF

Part I Election To Expense Certain Property Under Section 179**Note:** If you have any listed property, complete Part V before you complete Part I.

1	Maximum amount (see instructions).	1	
2	Total cost of section 179 property placed in service (see instructions).	2	
3	Threshold cost of section 179 property before reduction in limitation (see instructions).	3	
4	Reduction in limitation Subtract line 3 from line 2. If zero or less, enter -0-	4	
5	Dollar limitation for tax year Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see instructions	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property. Enter the amount from line 29	7	
8	Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7	8	
9	Tentative deduction. Enter the smaller of line 5 or line 8	9	
10	Carryover of disallowed deduction from line 13 of your 2009 Form 4562	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5 (see instrs.)	11	
12	Section 179 expense deduction. Add lines 9 and 10, but do not enter more than line 11	12	
13	Carryover of disallowed deduction to 2011. Add lines 9 and 10, less line 12	13	

Note: Do not use Part II or Part III below for listed property. Instead, use Part V.**Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property.) (See instructions.)**

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year (see instructions).	14	
15	Property subject to section 168(f)(1) election.	15	
16	Other depreciation (including ACRS)	16	

Part III MACRS Depreciation (Do not include listed property.) (See instructions.)**Section A**

17	MACRS deductions for assets placed in service in tax years beginning before 2010	17	478.
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here ☐		

Section B — Assets Placed in Service During 2010 Tax Year Using the General Depreciation System

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only — see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property						
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs		S/L	
h Residential rental property			27.5 yrs	MM	S/L	
i Nonresidential real property			27.5 yrs	MM	S/L	
			39 yrs	MM	S/L	
				MM	S/L	

Section C — Assets Placed in Service During 2010 Tax Year Using the Alternative Depreciation System

20a Class life				S/L	
b 12-year		12 yrs		S/L	
c 40-year		40 yrs	MM	S/L	

Part IV Summary (See instructions.)

21	Listed property. Enter amount from line 28	21	
22	Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations — see instructions.	22	478.
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

STEPHEN H. STURGES & ROSE P. STURGES
CHARITABLE TRUST

86-0427923

Statement 1
Form 990-PF, Part I, Line 16b
Accounting Fees

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
2009 Tax Return	\$ 2,000.	\$ 1,000.		\$ 1,000.
Monthly Bookkeeping	3,000.	1,500.		1,500.
Total	<u>\$ 5,000.</u>	<u>\$ 2,500.</u>	<u>\$ 0.</u>	<u>\$ 2,500.</u>

Statement 2
Form 990-PF, Part I, Line 16c
Other Professional Fees

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Shadle & Walsma	\$ 195.	\$ 97.		\$ 97.
Trust Administrator- Amy Gill	35,200.	17,600.		17,600.
Total	<u>\$ 35,395.</u>	<u>\$ 17,697.</u>	<u>\$ 0.</u>	<u>\$ 17,697.</u>

Statement 3
Form 990-PF, Part I, Line 23
Other Expenses

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
BANK CHARGES	\$ 89.	\$ 44.		\$ 45.
INSURANCE	2,414.			2,414.
INVESTMENT FEES	26,220.	26,220.		
OFFICE SUPPLIES	2,807.	1,403.		1,404.
Rounding	3.			
Total	<u>\$ 31,533.</u>	<u>\$ 27,667.</u>	<u>\$ 0.</u>	<u>\$ 3,863.</u>

Statement 4
Form 990-PF, Part II, Line 10b
Investments - Corporate Stocks

Corporate Stocks	Valuation Method	Book Value	Fair Market Value
Mofo - CORPORATE STOCK	Cost	\$ 1,119,041.	\$ 1,214,507.
NT -- CORPORATE STOCK	Cost	934,504.	1,045,086.
Total		<u>\$ 2,053,545.</u>	<u>\$ 2,259,593.</u>

Statement 5
Form 990-PF, Part II, Line 10c
Investments - Corporate Bonds

<u>Corporate Bonds</u>	<u>Valuation Method</u>	<u>Book Value</u>	<u>Fair Market Value</u>
MofO - CORPORATE BONDS	Cost	\$ 700,345.	\$ 715,476.
NT - CORPORATE BONDS	Cost	977,958.	1,006,416.
	Total	<u>\$ 1,678,303.</u>	<u>\$ 1,721,892.</u>

Statement 6
Form 990-PF, Part II, Line 13
Investments - Other

<u>Other Investments</u>	<u>Valuation Method</u>	<u>Book Value</u>	<u>Fair Market Value</u>
MofO - Money Market Account	Cost	\$ 140,000.	\$ 140,000.
NT -- Commodities	Cost	55,000.	55,470.
MofO - CASH	Cost	55,989.	55,989.
NT -- CASH	Cost	108,662.	108,662.
NT -- Real Estate	Cost	30,000.	29,920.
	Total	<u>\$ 389,651.</u>	<u>\$ 390,041.</u>

Statement 7
Form 990-PF, Part II, Line 14
Land, Buildings, and Equipment

<u>Category</u>	<u>Basis</u>	<u>Accum. Deprec.</u>	<u>Book Value</u>	<u>Fair Market Value</u>
Furniture and Fixtures	\$ 3,832.	\$ 3,618.	\$ 214.	\$ 214.
Total	<u>\$ 3,832.</u>	<u>\$ 3,618.</u>	<u>\$ 214.</u>	<u>\$ 214.</u>

Statement 8
Form 990-PF, Part II, Line 15
Other Assets

	<u>Book Value</u>	<u>Fair Market Value</u>
PREPAID EXPENSES	\$ 2,440.	\$ 2,440.
Total	<u>\$ 2,440.</u>	<u>\$ 2,440.</u>

STEPHEN H. STURGES & ROSE P. STURGES
CHARITABLE TRUST

86-0427923

Statement 9
Form 990-PF, Part IV, Line 1
Capital Gains and Losses for Tax on Investment Income

Item	(a) Description	(b) How Acquired	(c) Date Acquired	(d) Date Sold
1	20 AMAZON COM INC	Purchased	Various	12/22/2010
2	MFB NORTHERN FDS INDEX	Purchased	Various	12/22/2010
3	MFB NORTHERN FDS MULTI-MGR EMERGING MARK	Purchased	Various	12/22/2010
4	600 BANK OF AMERICA CORP	Purchased	5/03/2010	12/22/2010
5	836.82 MFB NORTHERN FDS MULTI-MGR EMERGING MARK	Purchased	Various	1/27/2011
6	575.82 MFB NORTHERN FDS MULTI-MGR EMERGING MARK	Purchased	Various	1/27/2011
7	20 APPLE INC COM	Purchased	Various	1/27/2011
8	200 CISCO SYSTEM INC. COMMON STOCK	Purchased	Various	1/27/2011
9	30 CUMMINGS INC	Purchased	5/03/2010	1/27/2011
10	200 GENERAL ELECTRIC	Purchased	Various	1/27/2011
11	20 INTERNATIONAL BUSINESS MACHS	Purchased	Various	1/27/2011
12	150 MFC SELECT SECTOR SPDR	Purchased	Various	1/27/2011
13	50 PRAXAIR INC COMMON STOCK	Purchased	Various	1/27/2011
14	400 SCHWAB CHARLES CORP	Purchased	Various	1/27/2011
15	270 SYSCO CORP COMMON STOCK	Purchased	6/22/2010	1/27/2011
16	50 UNITED HEALTH GROUP INC	Purchased	5/03/2010	1/27/2011
17	80 WALT DISNEY CO	Purchased	Various	1/27/2011
18	170 ADR TEVA PHARMACEUTICAL INDS	Purchased	Various	3/11/2011
19	10 APPLE INC COM	Purchased	Various	3/11/2011
20	30 CUMMINGS INC	Purchased	5/03/2010	3/11/2011
21	50 DANAHER CORP COMMON STOCK	Purchased	Various	3/11/2011
22	60 DU PONT E I NEMOURS & CO	Purchased	5/03/2010	3/11/2011
23	100 GENERAL ELECTIC	Purchased	Various	3/11/2011
24	50 JOHNSON & JOHNSON COM	Purchased	Various	3/11/2011
25	30 MCKESSON CORP	Purchased	5/03/2011	3/11/2011
26	80 PEPSICO INC	Purchased	Various	3/11/2011
27	30 PRAXAIR INC COMMON STOCK	Purchased	Various	3/11/2011
28	70 PROCTER & GAMBLE COM	Purchased	Various	3/11/2011
29	50 UNITED HEALTH GROUP INC	Purchased	5/03/2011	3/11/2011
30	100 WALT DISNEY CO	Purchased	Various	3/11/2011
31	825.76 MFB NORTHERN FDS MULTI-MGR EMERGING MARK	Purchased	Various	3/11/2011
32	939.85 MFB NORTHERN FDS MULTI-MGR EMERGING MARK	Purchased	Various	3/11/2011
33	60 ALTERA CORP COM	Purchased	Various	7/12/2011
34	25 AMAZON COM INC	Purchased	Various	7/12/2011
35	100 BELKSHIRE HATHAWAY INC	Purchased	8/09/2010	7/12/2011
36	600 CISCO SYSTEM INC. COMMON STOCK	Purchased	Various	7/12/2011
37	50 EMC CORP COM	Purchased	1/27/2011	7/12/2011
38	130 FEDEX CORP COMM	Purchased	Various	7/12/2011
39	120 LOWE'S COS INC COMMON STOCK	Purchased	8/09/2010	7/12/2011
40	160 MEDCO HEALTH SOLUTIONS	Purchased	Various	7/12/2011
41	400 MICROSOFT CORP COM	Purchased	Various	7/12/2011
42	70 NIKE INC CL B CLB	Purchased	Various	7/12/2011
43	230 PG & E CORP COMMON STOCK	Purchased	Various	7/12/2011
44	2033.62 MFB NORTHERN FDS MULTI-MGR EMERGING MARK	Purchased	12/21/2010	8/25/2011
45	3223.72 MFB NORTHERN FDS MULTI-MGR EMERGING MARK	Purchased	Various	8/25/2011
46	3344.26 MFB NORTHERN FDS MULTI-MGR EMERGING MARK	Purchased	Various	8/25/2011
47	120 STARWOOD HOTELS & RESORTS WORLDWIDE INC	Purchased	3/11/2011	8/25/2011

STEPHEN H. STURGES & ROSE P. STURGES
CHARITABLE TRUST

86-0427923

Statement 9 (continued)
Form 990-PF, Part IV, Line 1
Capital Gains and Losses for Tax on Investment Income

Item	(a) Description	(b) How Acquired	(c) Date Acquired	(d) Date Sold
48	9895.22 MFB NORTHERN HIGH YIELD FIXED INCOME	Purchased	Various	9/02/2011
49	4261.36 MFB NORTHERN INTERNATIONAL EQUITY FUND	Purchased	Various	9/28/2011
50	80 ABBOTT LABORATORIES, COMMON STOCK	Purchased	Various	9/28/2011
51	30 CUMMINGS INC	Purchased	Various	9/28/2011
52	280 JUNIPER NETWORKS, INC COM	Purchased	7/12/2011	9/28/2011
53	350 MFC SELECT SECTOR SPDR	Purchased	Various	9/28/2011
54	230 PAYCHECK INC. COMMON STOCK	Purchased	3/11/2011	9/28/2011
55	60 TJX COS INC COMMON NEW (TJX)	Purchased	Various	9/28/2011
56	11596.18 MFB NORTHERN INTERNATIONAL EQUITY FUND	Purchased	Various	Various
57	200 JOHNSON CONTROLS INC COMMON STOCK	Purchased	7/12/2011	11/10/2011
58	190 OMNICOM GROUP INC. COMMON STOCK	Purchased	7/12/2011	11/10/2011
59	250 SUNCOR ENERGY INC. NEW COMMON STOCK	Purchased	Various	11/10/2011
60	2853.07 MFB NORTHERN INTERNATIONAL EQUITY FUND	Purchased	Various	11/10/2011
61	170 V.F. CORP COMMON STOCK	Purchased	7/12/2011	11/28/2011
62	120 TRAVELERS COS. INC COMMON STOCK	Purchased	Various	11/28/2011
63	1645 ISHARES BARCLAYS US TIPS BOND FUND	Purchased	Various	12/07/2010
64	1645 ISHARES BARCLAYS AGGREGATE BOND INDEX	Purchased	Various	12/07/2010
65	2030 ISHARES BARCLAYS 1-3 YR CREDIT BOND FUND	Purchased	Various	12/07/2010
66	125 SHARES SPDR S&P MIDCAP 400ETF TRUST	Purchased	Various	2/02/2011
67	105 SHARES ISHARES MSCI EMERGING MARKET INDEX	Purchased	Various	1/28/2011
68	185 SHARES ISHARES MSCI CANADA INDES FD	Purchased	8/20/2010	1/28/2011
69	55 SHARES SPDR GOLD TRUST	Purchased	Various	1/28/2011
70	1206/1285 SHARE ISHARES S&P 500 VALUE INDEX FUND	Purchased	Various	2/02/2011
71	240/395 SHARES SPDR S&P 500 EFT TRUST	Purchased	Various	1/28/2011
72	100 SHARES TECHNOLOGY SELECT SECTOR SPDR FUND	Purchased	2/04/2010	1/28/2011
73	3840 SHARES AMEX FINANCIAL SELECT INDEX	Purchased	1/28/2011	3/24/2011
74	735 SHARES SPDR S&P 500 EFT TRUST	Purchased	Various	7/13/2011
75	1315 SHARES ISHARES MSCI SINGAPORE INDEX FUND	Purchased	1/28/2011	10/13/2011
76	1655 SHARES MATERIALS SELECT SECTOR SPDR	Purchased	1/28/2011	10/13/2011
77	1740 SHARES AMEX INDUSTRIAL SELECT INDEX	Purchased	1/28/2011	10/13/2011
78	230 LOWE'S COS INC COMMON STOCK	Purchased	Various	7/12/2011
79	1479.29 MFB NORTHERN FDS MULTI-MGR EMERGING MARK	Purchased	Various	8/25/2011
80	21.18 MFB NORTHERN HIGH YIELD FIXED INCOME	Purchased	Various	9/02/2011
81	3240 ISHARES MSCI SINGAPORE INDEX FUND	Purchased	Various	10/13/2011

Item	(e) Gross Sales	(f) Deprec. Allowed	(g) Cost Basis	(h) Gain (Loss)	(i) FMV 12/31/69	(j) Adj. Bas. 12/31/69	(k) Excess (i) - (j)	(l) Gain (Loss)
1	3,690.		1,815.	1,875.				\$ 1,875.
2	509.		0.	509.				509.
3	2,626.		0.	2,626.				2,626.
4	7,950.		10,890.	-2,940.				-2,940.
5	10,000.		8,368.	1,632.				1,632.
6	6,000.		5,758.	242.				242.
7	6,877.		1,542.	5,335.				5,335.

Federal Statements
STEPHEN H. STURGES & ROSE P. STURGES
CHARITABLE TRUST

Statement 9 (continued)
Form 990-PF, Part IV, Line 1
Capital Gains and Losses for Tax on Investment Income

Item	(e) Gross Sales	(f) Deprec. Allowed	(g) Cost Basis	(h) Gain (Loss)	(i) FMV 12/31/69	(j) Adj. Bas. 12/31/69	(k) Excess (i) - (j)	(l) Gain (Loss)
8	4,267.		2,485.	1,782.				\$ 1,782.
9	3,303.		2,219.	1,084.				1,084.
10	3,985.		5,726.	-1,741.				-1,741.
11	3,226.		2,470.	756.				756.
12	10,771.		4,176.	6,595.				6,595.
13	4,555.		2,227.	2,328.				2,328.
14	7,186.		8,624.	-1,438.				-1,438.
15	8,028.		8,343.	-315.				-315.
16	2,037.		1,520.	517.				517.
17	3,157.		2,317.	840.				840.
18	8,320.		3,159.	5,161.				5,161.
19	3,482.		771.	2,711.				2,711.
20	2,924.		2,219.	705.				705.
21	2,527.		2,085.	442.				442.
22	3,126.		2,410.	716.				716.
23	2,008.		2,594.	-586.				-586.
24	2,956.		2,366.	590.				590.
25	2,338.		1,951.	387.				387.
26	5,157.		3,608.	1,549.				1,549.
27	2,924.		1,336.	1,588.				1,588.
28	4,293.		2,476.	1,817.				1,817.
29	2,174.		1,520.	654.				654.
30	4,253.		2,896.	1,357.				1,357.
31	10,000.		8,258.	1,742.				1,742.
32	10,000.		9,399.	601.				601.
33	2,752.		1,552.	1,200.				1,200.
34	5,365.		2,268.	3,097.				3,097.
35	7,498.		8,083.	-585.				-585.
36	9,258.		7,456.	1,802.				1,802.
37	1,353.		1,238.	115.				115.
38	12,302.		12,004.	298.				298.
39	2,767.		2,443.	324.				324.
40	8,749.		4,805.	3,944.				3,944.
41	10,632.		10,924.	-292.				-292.
42	6,399.		5,487.	912.				912.
43	9,664.		9,898.	-234.				-234.
44	10,882.		13,490.	-2,608.				-2,608.
45	33,559.		32,052.	1,507.				1,507.
46	30,266.		33,402.	-3,136.				-3,136.
47	4,974.		6,935.	-1,961.				-1,961.
48	69,761.		68,510.	1,251.				1,251.
49	30,000.		33,026.	-3,026.				-3,026.
50	4,058.		3,898.	160.				160.
51	2,774.		2,219.	555.				555.
52	5,443.		8,775.	-3,332.				-3,332.
53	21,903.		9,744.	12,159.				12,159.
54	6,201.		7,603.	-1,402.				-1,402.
55	3,515.		1,891.	1,624.				1,624.
56	85,000.		91,162.	-6,162.				-6,162.
57	6,162.		8,290.	-2,128.				-2,128.
58	8,279.		9,067.	-788.				-788.
59	7,759.		8,539.	-780.				-780.
60	20,000.		22,111.	-2,111.				-2,111.

Federal Statements
STEPHEN H. STURGES & ROSE P. STURGES
CHARITABLE TRUST

Statement 9 (continued)
Form 990-PF, Part IV, Line 1
Capital Gains and Losses for Tax on Investment Income

Item	(e) Gross Sales	(f) Deprec. Allowed	(g) Cost Basis	(h) Gain (Loss)	(i) FMV 12/31/69	(j) Adj. Bas. 12/31/69	(k) Excess (i) - (j)	(l) Gain (Loss)
61	7,149.		8,769.	-1,620.				\$ -1,620.
62	6,463.		6,148.	315.				315.
63	333.		0.	333.				333.
64	98.		0.	98.				98.
65	86.		0.	86.				86.
66	20,899.		20,398.	501.				501.
67	4,781.		4,108.	673.				673.
68	5,739.		4,805.	934.				934.
69	7,188.		4,712.	2,476.				2,476.
70	152,745.		142,481.	10,264.				10,264.
71	81,386.		96,501.	-15,115.				-15,115.
72	2,584.		2,100.	484.				484.
73	62,284.		63,116.	-832.				-832.
74	98,376.		104,266.	-5,890.				-5,890.
75	15,276.		18,147.	-2,871.				-2,871.
76	53,692.		63,072.	-9,380.				-9,380.
77	54,789.		62,779.	-7,990.				-7,990.
78	5,304.		5,059.	245.				245.
79	29,039.		30,000.	-961.				-961.
80	149.		149.	0.				0.
81	37,638.		36,543.	1,095.				1,095.
Total								\$ 12,369.

Statement 10
Form 990-PF, Part VIII, Line 1
List of Officers, Directors, Trustees, and Key Employees

Name and Address	Title and Average Hours Per Week Devoted	Compen- sation	Contri- bution to EBP & DC	Expense Account/ Other
GEORGE GALLAHER P.O. BOX 4997 YUMA, AZ 85366-4997	Trustee 10	\$ 1,200.	\$ 0.	\$ 0.
LINDA RUNDELL 14632 EAST 53D STREET YUMA, AZ 85365	Trustee 10	1,200.	0.	0.
JANE E. SCHOENHERR 6164 EAST HAWKS NEST PLACE TUCSON, AZ 85750	Trustee 10	1,200.	0.	0.
PAUL M. SCHWARK 190 MADISON AVE. YUMA, AZ 85364	Trustee 10	1,200.	0.	0.

STEPHEN H. STURGES & ROSE P. STURGES
CHARITABLE TRUST

86-0427923

Statement 10 (continued)
Form 990-PF, Part VIII, Line 1
List of Officers, Directors, Trustees, and Key Employees

Name and Address	Title and Average Hours Per Week Devoted	Compen- sation	Contri- bution to EBP & DC	Expense Account/ Other
VALARIE DONNELLY P.O. BOX 4997 YUMA, AZ 85364-4997	Trustee 10	\$ 1,200.	\$ 0.	\$ 0.
MICHAEL McDANIEL 2045 S 14TH. AVENUE #50 YUMA, AZ 85364	President 0	0.	0.	0.
Total		\$ 6,000.	\$ 0.	\$ 0.

Statement 11
Form 990-PF, Part XV, Line 2a-d
Application Submission Information

Name of Grant Program: STURGES CHARITABLE TRUST
 Name:
 Care Of: AMY GILL
 Street Address: 833 PLAZA CIRCLE
 City, State, Zip Code: YUMA, AZ 85364
 Telephone:
 Form and Content: WRITTEN REQUESTS
 Submission Deadlines: WITHIN 45 DAYS OF AWARDS
 Restrictions on Awards: PER INTENDED REQUEST AWARDED

Statement 12
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
Yuma Community Foundation P.O. Box 6835 Yuma, AZ 85364	None	P Charity	Community	\$ 55,000.
David Johnson Arizona State University	None	Individua	Scholarship	2,500.
Mattie Henry University of Arizona	None	Individua	Scholarship	2,500.

Federal Statements
STEPHEN H. STURGES & ROSE P. STURGES
CHARITABLE TRUST

Statement 12 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Jeannete Ramirez University of Arizona ,	None	Individua	Scholarship	\$ 2,500.
Itzel Rodriguez University of Arizona ,	None	Individua	Scholarship	1,250.
Samantha Eatherly University of Arizona ,	None	Individua	Scholarship	2,500.
Timothy Tiutan University of Arizona ,	None	Individua	Scholarship	2,500.
Danielle Amavisca University of Arizona ,	None	Individua	Scholarship	2,500.
Diana de la Torre University of Arizona ,	None	Individua	Scholarship	2,500.
Julieta Calderon University of Arizona ,	None	Individua	Scholarship	2,500.
Leticia Moedano Yale College ,	None	Individua	Scholarship	1,250.
Brad Frandsen Arizona State University ,	None	Individua	Scholarship	2,500.
Maple So Arizona State University ,	None	Individua	Scholarship	2,500.
Lorena Valle Arizona State University ,	None	Individua	Scholarship	2,500.
Grecia Camacho Arizona State University ,	None	Individua	Scholarship	2,500.
Arturo Garcia Duke University ,	None	Individua	Scholarship	1,250.

Statement 12 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Britanny Maldonado University of Arizona ,	None	Individua	Scholarship	\$ 1,250.
Jessie Tibbs Middlebury College ,	None	Individua	Scholarship	2,500.
Elizabeth Norton Morning Side College ,	None	Individua	Scholarship	2,500.
Kellie Millner Souther Utah University ,	None	Individua	Scholarship	2,500.
Ashley DeDecker St. Norbert College ,	None	Individua	Scholarship	2,500.
Samantha Chambless University of Florida ,	None	Individua	Scholarship	2,500.
Korey Johnson Arizona State University ,	None	Individua	Scholarship	2,500.
Jose Luis Gomez Arizona State University ,	None	Individua	Scholarship	1,250.
Adrian Maranon Arizona State University ,	None	Individua	Scholarship	2,500.
David Gonzales Arizona State University ,	None	Individua	Scholarship	2,500.
Alba Vega Northern Arizona University ,	None	Individua	Scholarship	2,500.
Keely Misenhimer Chapman University ,	None	Individua	Scholarship	2,500.
David Loeffler Franciscan University ,	None	Individua	Scholarship	2,500.

Statement 12 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Danielle Dornstadtler Grand Canyon University ,	None	Individua	Scholarship	\$ 2,500.
Morgan O'Malley Loyola Marymount University ,	None	Individua	Scholarship	2,500.
James Whitmer Norther Arizona University ,	None	Individua	Scholarship	1,250.
Senecca Alfred Northern Arizona University ,	None	Individua	Scholarship	1,250.
Malini Chauhan University of Arizona ,	None	Individua	Scholarship	1,250.
Teagan Hasler University of Arizona ,	None	Individua	Scholarship	2,500.
April Ehrlich University of Arizona ,	None	Individua	Scholarship	2,500.
Bianca Demara University of Arizona ,	None	Individua	Scholarship	1,250.
Carmen Moedano Brown University ,	None	Individua	Scholarship	2,500.
Amanda Harrison Northen AZ University ,	None	Individua	Scholarship	1,250.
Amanda Mollindo Arizona State University ,	None	Individua	Scholarship	1,250.
Anthony Cicchino University of Arizona ,	None	Individua	Scholarship	1,250.
Anthony Matus Fordham University ,	None	Individua	Scholarship	1,250.

Statement 12 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Carolina Ramirez University of Arizona ,	None	Individua	Scholarship	\$ 1,250.
Chelsea Madsen Northen Arizona Univesity ,	None	Individua	Scholarhip	1,250.
David Deckey Brown University ,	None	Individua	Scholarship	1,250.
David Jaime Modesto Junior College ,	None	Individua	Scholarship	1,250.
Felipe Valle Arizona State University ,	None	Individua	Scholarship	1,250.
Johnnie Ehrlich Arizona State University ,	None	Individua	Scholarship	1,250.
Kelsey Wyman University of Arizona ,	None	Individua	Scholarship	1,250.
Mun Aw University or Arizona ,	None	Individua	Scholarship	1,250.
Sean Peters Rice University ,	None	Individua	Scholarship	1,250.
Elizabeth Babbitt University of Arizona ,	None	Individua	Scholarship	1,250.
Thea Denten University of Arizona ,	None	Individua	Scholarship	1,250.
Jose Rodriguez Arizona State University ,	None	Individua	Scholarship	1,250.
Michael Chong Notre Dame ,	None	Individua	Scholarship	1,250.

Statement 12 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Yuma Community Food Bank 2404 E 24th. St Yuma, AZ 85365	None	P Charity	Community	\$ 13,000.
Crossroads Mission P.O. Box 1161 Yuma, AZ 85366	None	P Charity	Community	9,000.
Yuma Crossing National Heritage 180 W. 1st street, ste E Yuma, AZ 85364	None	Historic	Historic Preservation	5,000.
Alex Stratton University of Arizona ,	None	Individua	Scholarship	2,500.
Elizabeth Gyek University of Arizona ,	None	Individua	Scholarship	1,250.
Aileen Velarde U C S D ,	None	Individua	Scholarship	1,250.
Jorge Amaya Arizona State University ,	None	Individua	Scholarship	1,250.
Jacob Vint Central Arizona College ,	None	Individua	Scholarship	1,250.
Lillie Fairchild University of California, LA ,	None	Individua	Scholaship	1,250.
Brenda Quintero University of Arizona ,	None	Individua	Scholarship	1,250.
Thomas Petersen North Carolina State University ,	None	Individua	Scholarship	1,250.
Mariana Curtis Eastern Arizona College ,	None	Individua	Scholarship	1,250.

2010

Federal Statements
STEPHEN H. STURGES & ROSE P. STURGES
CHARITABLE TRUST

Page 13

86-0427923

Statement 12 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Mei So University of Arizona ,	None	Individua	Scholarship	\$ 1,250.
Patricia Ozuna University of Arizona ,	None	Individua	Scholarship	1,250.
Richelle Robbins NAU ,	None	Individua	Scholarship	1,250.
Rocio Lopez Eastern Arizona College ,	None	Individua	Scholarship	1,250.
Total				\$ <u>202,000.</u>