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

2010Department 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 OCT 1, 2010, and ending SEP 30, 2011

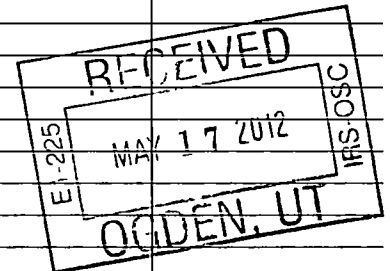
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name change

| | | |
|---|--|--|
| Name of foundation THE LALOR FOUNDATION, INC. | | A Employer identification number 51-6000153 |
| Number and street (or P.O. box number if mail is not delivered to street address) 77 SUMMER STREET, 8TH FLOOR | Room/suite | B Telephone number 617-426-7080 |
| City or town, state, and ZIP code BOSTON, MA 02110 | | C If exemption application is pending, check here <input type="checkbox"/> |
| H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation | | D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> |
| I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 10,883,401. | J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ | E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> |
| (Part I, column (d) must be on cash basis.) | | F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/> |

| Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) | | (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 | | | N/A | |
| 2 | Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B | | | | |
| 3 | Interest on savings and temporary cash investments | | | | |
| 4 | Dividends and interest from securities | 254,431. | 254,431. | | STATEMENT 1 |
| 5a | Gross rents | | | | |
| b | Net rental income or (loss) | | | | |
| 6a | Net gain or (loss) from sale of assets not on line 10 | 183,275. | | | |
| b | Gross sales price for all assets on line 6a | 2,004,623. | | | |
| 7 | Capital gain net income (from Part IV, line 2) | | 183,275. | | |
| 8 | Net short-term capital gain | | | | |
| 9 | Income modifications | | | | |
| 10a | Gross sales less returns and allowances | | | | |
| b | Less: Cost of goods sold | | | | |
| c | Gross profit or (loss) | | | | |
| 11 | Other income | 5,268. | 1,295. | | STATEMENT 2 |
| 12 | Total. Add lines 1 through 11 | 442,974. | 439,001. | | |
| 13 | Compensation of officers, directors, trustees, etc | 0. | 0. | | 0. |
| 14 | Other employee salaries and wages | | | | |
| 15 | Pension plans, employee benefits | | | | |
| 16a | Legal fees | | | | |
| b | Accounting fees | 6,397. | 0. | | 6,397. |
| c | Other professional fees | 83,070. | 45,374. | | 33,263. |
| 17 | Interest | | | | |
| 18 | Taxes | 1,638. | 1,638. | | 0. |
| 19 | Depreciation and depletion | | | | |
| 20 | Occupancy | | | | |
| 21 | Travel, conferences, and meetings | 266. | 0. | | 266. |
| 22 | Printing and publications | | | | |
| 23 | Other expenses | 5,324. | 0. | | 5,324. |
| 24 | Total operating and administrative expenses. Add lines 13 through 23 | 96,695. | 47,012. | | 45,250. |
| 25 | Contributions, gifts, grants paid | 440,000. | | | 382,333. |
| 26 | Total expenses and disbursements. Add lines 24 and 25 | 536,695. | 47,012. | | 427,583. |
| 27 | Subtract line 26 from line 12: | | | | |
| a | Excess of revenue over expenses and disbursements | <93,721.> | | | |
| b | Net investment income (if negative, enter -0-) | | 391,989. | | |
| c | Adjusted net income (if negative, enter -0-) | | | N/A | |

SCANNED MAY 18 2012

Operating and Administrative Expenses



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| Part II Balance Sheets | | Attached schedules and amounts in the description column should be for end-of-year amounts only | | |
|-----------------------------|---|---|----------------|-----------------------|
| | | Beginning of year | End of year | |
| | | (a) Book Value | (b) Book Value | (c) Fair Market Value |
| Assets | 1 Cash - non-interest-bearing | 20,761. | 36,745. | 36,745. |
| | 2 Savings and temporary cash investments | 374,798. | 234,736. | 234,736. |
| | 3 Accounts receivable ▶ | | | |
| | Less: allowance for doubtful accounts ▶ | 2,694. | | |
| | 4 Pledges receivable ▶ | | | |
| | Less: allowance for doubtful accounts ▶ | | | |
| | 5 Grants receivable | | | |
| | 6 Receivables due from officers, directors, trustees, and other disqualified persons | | | |
| | 7 Other notes and loans receivable ▶ | | | |
| | Less: allowance for doubtful accounts ▶ | | | |
| | 8 Inventories for sale or use | | | |
| | 9 Prepaid expenses and deferred charges | | | |
| | 10a Investments - U.S. and state government obligations \$TMT 7 | 509,940. | 501,100. | 501,100. |
| | b Investments - corporate stock \$TMT 8 | 7,623,680. | 6,733,013. | 6,733,013. |
| | c Investments - corporate bonds \$TMT 9 | 1,769,824. | 2,042,031. | 2,042,031. |
| Liabilities | 11 Investments - land, buildings, and equipment basis ▶ | | | |
| | Less: accumulated depreciation ▶ | | | |
| | 12 Investments - mortgage loans | | | |
| | 13 Investments - other \$TMT 10 | 1,177,516. | 1,335,776. | 1,335,776. |
| | 14 Land, buildings, and equipment: basis ▶ | | | |
| | Less: accumulated depreciation ▶ | | | |
| | 15 Other assets (describe ▶) | | | |
| | 16 Total assets (to be completed by all filers) | 11,479,213. | 10,883,401. | 10,883,401. |
| | 17 Accounts payable and accrued expenses | 5,802. | 13,235. | |
| | 18 Grants payable | 80,833. | 138,500. | |
| | 19 Deferred revenue | | | |
| | 20 Loans from officers, directors, trustees, and other disqualified persons | | | |
| | 21 Mortgages and other notes payable | | | |
| | 22 Other liabilities (describe ▶ DEFERRED EXCISE TAX) | 42,100. | 31,000. | |
| | 23 Total liabilities (add lines 17 through 22) | 128,735. | 182,735. | |
| Net Assets or Fund Balances | Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input type="checkbox"/> | | | |
| | 24 Unrestricted | | | |
| | 25 Temporarily restricted | | | |
| | 26 Permanently restricted | | | |
| | Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/> | | | |
| | 27 Capital stock, trust principal, or current funds | 11,350,478. | 10,700,666. | |
| | 28 Paid-in or capital surplus, or land, bldg., and equipment fund | 0. | 0. | |
| | 29 Retained earnings, accumulated income, endowment, or other funds | 0. | 0. | |
| | 30 Total net assets or fund balances | 11,350,478. | 10,700,666. | |
| | 31 Total liabilities and net assets/fund balances | 11,479,213. | 10,883,401. | |

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 | 11,350,478. |
| 2 Enter amount from Part I, line 27a | 2 | <93,721.> |
| 3 Other increases not included in line 2 (itemize) ▶ | 3 | 0. |
| 4 Add lines 1, 2, and 3 | 4 | 11,256,757. |
| 5 Decreases not included in line 2 (itemize) ▶ UNREALIZED LOSS ON INVESTMENTS | 5 | 556,091. |
| 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 | 6 | 10,700,666. |

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 PUBLICLY TRADED SECURITIES | | | | | |
| 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 2,004,623. | | 1,821,348. | 183,275. | | |
| b | | | | | |
| c | | | | | |
| d | | | | | |
| e | | | | | |
| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 | | | (i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h)) | | |
| (i) F.M.V. as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of col. (i) over col. (j), if any | | | |
| a | | | 183,275. | | |
| 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 | 183,275. | |
| 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 | | | 3 | N/A | |

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see instructions before making any entries.

| (a) Base period years Calendar year (or tax year beginning in) | (b) Adjusted qualifying distributions | (c) Net value of noncharitable-use assets | (d) Distribution ratio (col. (b) divided by col. (c)) |
|---|---------------------------------------|---|--|
| 2009 | 604,096. | 10,949,276. | .055172 |
| 2008 | 391,714. | 9,438,749. | .041501 |
| 2007 | 279,878. | 12,785,376. | .021890 |
| 2006 | 457,660. | 13,097,962. | .034941 |
| 2005 | 807,180. | 12,331,589. | .065456 |
| 2 Total of line 1, column (d) | | | 2 .218960 |
| 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 .043792 |
| 4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5 | | | 4 11,978,473. |
| 5 Multiply line 4 by line 3 | | | 5 524,561. |
| 6 Enter 1% of net investment income (1% of Part I, line 27b) | | | 6 3,920. |
| 7 Add lines 5 and 6 | | | 7 528,481. |
| 8 Enter qualifying distributions from Part XII, line 4 | | | 8 427,583. |

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

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

| | | | |
|--|----|---------|--------|
| 1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions) | | | |
| b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b | | 1 | 7,840. |
| c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b). | | | |
| 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) | | 2 | 0. |
| 3 Add lines 1 and 2 | | 3 | 7,840. |
| 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 | 7,840. |
| 6 Credits/Payments: | | | |
| a 2010 estimated tax payments and 2009 overpayment credited to 2010 | 6a | 4,800. | |
| b Exempt foreign organizations - tax withheld at source | 6b | | |
| c Tax paid with application for extension of time to file (Form 8868) | 6c | 5,500. | |
| d Backup withholding erroneously withheld | 6d | | |
| 7 Total credits and payments. Add lines 6a through 6d | 7 | 10,300. | |
| 8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached | 8 | | |
| 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed | 9 | | |
| 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid | 10 | 2,460. | |
| 11 Enter the amount of line 10 to be: Credited to 2011 estimated tax <input type="checkbox"/> 2,460. Refunded <input type="checkbox"/> | 11 | 0. | |

Part VII-A Statements Regarding Activities

| | Yes | No |
|---|-----|----|
| 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? | | x |
| 1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 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 | | x |
| 1c 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. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0. | | |
| e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 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 |
| 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? | | x |
| b If "Yes," has it filed a tax return on Form 990-T for this year? | | |
| 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 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, col. (c), and Part XV. | x | |
| 8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> DE, MA | | |
| 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 |

Part VII-A Statements Regarding Activities (continued)

| | | | | |
|----|---|----|---|---|
| 11 | At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions) | 11 | | x |
| 12 | Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008? | 12 | | x |
| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? | 13 | x | |

Website address ► WWW.LALORFOUND.ORG

14 The books are in care of ► GMA FOUNDATIONS Telephone no. ► 617-426-7080
 Located at ► 77 SUMMER STREET, 8TH FLOOR, BOSTON, MA ZIP+4 ► 02110

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 | No |
| | | | x |

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

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

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

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

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, foundation managers and their compensation.

| (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 11 | | 0. | 0. | 0. |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

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

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

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

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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. If none, enter "NONE."**

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

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

0

Part IX-A Summary of Direct Charitable Activities

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

Expenses

| | | |
|---|-----|--|
| 1 | N/A | |
| | | |
| 2 | | |
| | | |
| 3 | | |
| | | |
| 4 | | |
| | | |

Part IX-B Summary of Program-Related Investments

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

Amount

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

Total. Add lines 1 through 3

0.

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 | 12,078,634. |
| b Average of monthly cash balances | 1b | 79,324. |
| c Fair market value of all other assets | 1c | 2,928. |
| d Total (add lines 1a, b, and c) | 1d | 12,160,886. |
| 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 | 12,160,886. |
| 4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) | 4 | 182,413. |
| 5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5 | 11,978,473. |
| 6 Minimum investment return. Enter 5% of line 5 | 6 | 598,924. |

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

| | | | |
|--|----|----------|----------|
| 1 Minimum investment return from Part X, line 6 | | 1 | 598,924. |
| 2a Tax on investment income for 2010 from Part VI, line 5 | 2a | 7,840. | |
| b Income tax for 2010. (This does not include the tax from Part VI.) | 2b | | |
| c Add lines 2a and 2b | 2c | 7,840. | |
| 3 Distributable amount before adjustments. Subtract line 2c from line 1 | 3 | 591,084. | |
| 4 Recoveries of amounts treated as qualifying distributions | 4 | 673. | |
| 5 Add lines 3 and 4 | 5 | 591,757. | |
| 6 Deduction from distributable amount (see instructions) | 6 | 0. | |
| 7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 | 7 | 591,757. | |

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 | 427,583. |
| b Program-related investments - total from Part IX-B | 1b | 0. |
| 2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes | 2 | |
| 3 Amounts set aside for specific charitable projects that satisfy the: | | |
| a Suitability test (prior IRS approval required) | 3a | |
| b Cash distribution test (attach the required schedule) | 3b | |
| 4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 | 4 | 427,583. |
| 5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b | 5 | 0. |
| 6 Adjusted qualifying distributions. Subtract line 5 from line 4 | 6 | 427,583. |

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 | | | | 591,757. |
| 2 Undistributed income, if any, as of the end of 2010 | | | | |
| a Enter amount for 2009 only | | | 0. | |
| b Total for prior years: | | 0. | | |
| 3 Excess distributions carryover, if any, to 2010: | | | | |
| a From 2005 | 215,007. | | | |
| b From 2006 | | | | |
| c From 2007 | | | | |
| d From 2008 | | | | |
| e From 2009 | 64,284. | | | |
| f Total of lines 3a through e | 279,291. | | | |
| 4 Qualifying distributions for 2010 from Part XII, line 4: ▶ \$ | 427,583. | | | |
| a Applied to 2009, but not more than line 2a | | | 0. | |
| b Applied to undistributed income of prior years (Election required - see instructions) | | 0. | | |
| c Treated as distributions out of corpus (Election required - see instructions) | 0. | | | |
| d Applied to 2010 distributable amount | | | | 427,583. |
| 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)) | 164,174. | | | 164,174. |
| 6 Enter the net total of each column as indicated below: | | | | |
| a Corpus Add lines 3f, 4c, and 4e Subtract line 5 | 115,117. | | | |
| b Prior years' undistributed income. Subtract line 4b from line 2b | | 0. | | |
| c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed | | 0. | | |
| d Subtract line 6c from line 6b. Taxable amount - see instructions | | 0. | | |
| e Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount - see instr. | | | 0. | |
| f Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011 | | | | 0. |
| 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) | 0. | | | |
| 8 Excess distributions carryover from 2005 not applied on line 5 or line 7 | 50,833. | | | |
| 9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a | 64,284. | | | |
| 10 Analysis of line 9: | | | | |
| a Excess from 2006 | | | | |
| b Excess from 2007 | | | | |
| c Excess from 2008 | | | | |
| d Excess from 2009 | 64,284. | | | |
| e Excess from 2010 | | | | |

N/A

- ☐ 4942(j)(3) or ☐ 4942(j)(5)

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

Form **990-PF** (2010)

Part XV **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|--|--|--------------------------------------|-------------------------------------|-----------------|
| a <i>Paid during the year</i> | | | | |
| SEE STATEMENT 12 | | | | |
| Total | | | 3a | 382,333. |
| b <i>Approved for future payment</i> | | | | |
| Total SEE STATEMENT 13 | | | 3b | 138,500. |

Part XVII

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

- | | | Yes | No |
|----------|--|--------------|----|
| 1 | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of: | | |
| | (1) Cash | 1a(1) | x |
| | (2) Other assets | 1a(2) | x |
| b | Other transactions: | | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b(1) | x |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | x |
| | (3) Rental of facilities, equipment, or other assets | 1b(3) | x |
| | (4) Reimbursement arrangements | 1b(4) | x |
| | (5) Loans or loan guarantees | 1b(5) | x |
| | (6) Performance of services or membership or fundraising solicitations | 1b(6) | x |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | x |
| d | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | |

[illegible]

- 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 |
|--------------------------|--------------------------|---------------------------------|
| N/A | | |
| | | |
| | | |
| | | |
| | | |

**Sign
Here**

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

Signature of officer or trustee

Date _____

SECRETARY AND TREASURER

Title

**Paid
Preparer
Use Only**

Print/Type preparer's name

Preparer's signature

| | |
|------|--|
| Date | |
|------|--|

Check ☐ self-employed

| |
|------|
| PTIN |
|------|

JOEL ARONSON, CPA

JOEL ARONSON, CPA

03/30/12

Firm's name ► ALEXANDER, ARONSON, FINNING, & CO., P.C.

Firm's EIN ▶

Firm's address ► 21 EAST MAIN STREET

WESTBOROUGH MA 01581

Phone no. 508-366-9100

| | | | |
|-------------|--|-----------|---|
| FORM 990-PF | DIVIDENDS AND INTEREST FROM SECURITIES | STATEMENT | 1 |
|-------------|--|-----------|---|

| SOURCE | GROSS AMOUNT | CAPITAL GAINS DIVIDENDS | COLUMN (A) AMOUNT |
|----------------------------------|--------------|----------------------------|----------------------|
| DIVIDEND AND INTEREST INCOME | 254,431. | 0. | 254,431. |
| TOTAL TO FM 990-PF, PART I, LN 4 | 254,431. | 0. | 254,431. |

| | | | |
|-------------|--------------|-----------|---|
| FORM 990-PF | OTHER INCOME | STATEMENT | 2 |
|-------------|--------------|-----------|---|

| DESCRIPTION | (A) REVENUE PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME |
|---------------------------------------|-----------------------------|-----------------------------------|-------------------------------|
| GRANT REFUND | 673. | 0. | |
| SECURITY LITIGATION PROCEEDS | 1,295. | 1,295. | |
| EXCISE TAX CREDIT | 3,300. | 0. | |
| TOTAL TO FORM 990-PF, PART I, LINE 11 | 5,268. | 1,295. | |

| | | | |
|-------------|-----------------|-----------|---|
| FORM 990-PF | ACCOUNTING FEES | STATEMENT | 3 |
|-------------|-----------------|-----------|---|

| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
|------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| ACCOUNTING | 6,397. | 0. | | 6,397. |
| TO FORM 990-PF, PG 1, LN 16B | 6,397. | 0. | | 6,397. |

| | | | |
|-------------|-------------------------|-----------|---|
| FORM 990-PF | OTHER PROFESSIONAL FEES | STATEMENT | 4 |
|-------------|-------------------------|-----------|---|

| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
|------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| INVESTMENT ADVISORY | 45,374. | 45,374. | | 0. |
| GRANT MANAGEMENT | 37,696. | 0. | | 33,263. |
| TO FORM 990-PF, PG 1, LN 16C | 83,070. | 45,374. | | 33,263. |

| FORM 990-PF | TAXES | | | STATEMENT | 5 |
|-----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|----|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES | |
| FOREIGN TAX | 1,638. | 1,638. | | | 0. |
| TO FORM 990-PF, PG 1, LN 18 | 1,638. | 1,638. | | | 0. |

| FORM 990-PF | OTHER EXPENSES | | | STATEMENT | 6 |
|-----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|--------|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES | |
| INSURANCE | 1,200. | 0. | | | 1,200. |
| TELEPHONE AND OFFICE | 186. | 0. | | | 186. |
| MEMBERSHIP | 695. | 0. | | | 695. |
| POSTAGE & PRINTING | 627. | 0. | | | 627. |
| GRANT COMMITTEE | 2,366. | 0. | | | 2,366. |
| FILING FEE | 250. | 0. | | | 250. |
| TO FORM 990-PF, PG 1, LN 23 | 5,324. | 0. | | | 5,324. |

| FORM 990-PF | U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS | | | STATEMENT | 7 |
|--|--|----------------|------------|----------------------|---|
| DESCRIPTION | U.S. GOV'T | OTHER GOV'T | BOOK VALUE | FAIR MARKET VALUE | |
| U.S. GOVERNMENT AGENCY OBLIGATIONS | x | | 501,100. | 501,100. | |
| TOTAL U.S. GOVERNMENT OBLIGATIONS | | | 501,100. | 501,100. | |
| TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS | | | | | |
| TOTAL TO FORM 990-PF, PART II, LINE 10A | | | 501,100. | 501,100. | |

| | | | |
|-------------|-----------------|-----------|---|
| FORM 990-PF | CORPORATE STOCK | STATEMENT | 8 |
|-------------|-----------------|-----------|---|

| DESCRIPTION | BOOK VALUE | FAIR MARKET VALUE |
|---|------------|-------------------|
| CORPORATE STOCK | 6,733,013. | 6,733,013. |
| TOTAL TO FORM 990-PF, PART II, LINE 10B | 6,733,013. | 6,733,013. |

| | | | |
|-------------|-----------------|-----------|---|
| FORM 990-PF | CORPORATE BONDS | STATEMENT | 9 |
|-------------|-----------------|-----------|---|

| DESCRIPTION | BOOK VALUE | FAIR MARKET VALUE |
|---|------------|-------------------|
| CORPORATE BONDS | 2,042,031. | 2,042,031. |
| TOTAL TO FORM 990-PF, PART II, LINE 10C | 2,042,031. | 2,042,031. |

| | | | |
|-------------|-------------------|-----------|----|
| FORM 990-PF | OTHER INVESTMENTS | STATEMENT | 10 |
|-------------|-------------------|-----------|----|

| DESCRIPTION | VALUATION METHOD | BOOK VALUE | FAIR MARKET VALUE |
|--|------------------|------------|-------------------|
| MUTUAL FUNDS | COST | 1,335,776. | 1,335,776. |
| TOTAL TO FORM 990-PF, PART II, LINE 13 | | 1,335,776. | 1,335,776. |

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 11

| NAME AND ADDRESS | TITLE AND AVRG HRS/WK | COMPEN- SATION | EMPLOYEE BEN PLAN | EXPENSE CONTRIB ACCOUNT |
|--|---------------------------------|-------------------|----------------------|----------------------------|
| LALOR BURDICK C/O GMA FOUNDATIONS, 77 SUMMER STREET, 8TH FLOOR BOSTON, MA 02110 | SECRETARY AND TREASURER 1.00 | 0. | 0. | 0. |
| CAROL CHANDLER C/O GMA FOUNDATIONS, 77 SUMMER STREET, 8TH FLOOR BOSTON, MA 02110 | TRUSTEE 0.50 | 0. | 0. | 0. |
| CYNTHIA PATTERSON C/O GMA FOUNDATIONS, 77 SUMMER STREET, 8TH FLOOR BOSTON, MA 02110 | PRESIDENT 0.50 | 0. | 0. | 0. |
| SALLY ZECKHAUSER C/O GMA FOUNDATIONS, 77 SUMMER STREET, 8TH FLOOR BOSTON, MA 02110 | VICE PRESIDENT 0.50 | 0. | 0. | 0. |
| ANDREW BRAUN C/O GMA FOUNDATIONS, 77 SUMMER STREET, 8TH FLOOR BOSTON, MA 02110 | TRUSTEE 0.50 | 0. | 0. | 0. |
| CHRISTOPHER BURDICK C/O GMA FOUNDATIONS, 77 SUMMER STREET, 8TH FLOOR BOSTON, MA 02110 | TRUSTEE 0.50 | 0. | 0. | 0. |
| TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII | | 0. | 0. | 0. |

FORM 990-PF

GRANTS AND CONTRIBUTIONS
PAID DURING THE YEAR

STATEMENT 12

| RECIPIENT NAME AND ADDRESS | RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT | RECIPIENT STATUS | AMOUNT |
|--|---|---------------------|---------|
| WOMEN & INFANTS HOSPITAL 101 DUDLEY STREET PROVIDENCE, RI 02905 | NONE COMPREHENSIVE SEX EDUCATION FOR YOUNG WOMEN IN RHODE ISLAND | PUBLIC CHARITY | 25,000. |
| WESTERN WYOMING FAMILY PLANNING 809 THOMPSON STREET, #A ROCK SPRINGS, WY 82901 | NONE RURAL REPRODUCTIVE EDUCATION PROGRAM | PUBLIC CHARITY | 10,833. |
| UNIVERSITY OF PITTSBURGH ANAHEIM, CALIFORNIA 92806 USA PITTSBURGH, PA 15213 | NONE FELLOWSHIP PROGRAM | PUBLIC CHARITY | 30,000. |
| UNIVERSITY OF OTTAWA 550 CUMBERLAND STREET OTTAWA, ONTARIO, CANADA K1N 6N5 | NONE FELLOWSHIP PROGRAM | PUBLIC CHARITY | 5,000. |
| UNIVERSITY OF MISSOURI 310 JESSE HALL COLUMBIA, MO 65211 | NONE FELLOWSHIP PROGRAM | PUBLIC CHARITY | 30,000. |
| UNIVERSITY OF MA MEDICAL SCHOOL 333 SOUTH STREET, SUITE 290 SHREWSBURY, MA 01545 | NONE FELLOWSHIP PROGRAM | PUBLIC CHARITY | 5,000. |
| THE REGENTS OF THE UNIVERSITY OF CALIFORNIA 9500 GILMAN DRIVE, DEPT 0012 LA JOLLA, CA 92093 | NONE FELLOWSHIP PROGRAM | PUBLIC CHARITY | 5,000. |
| THE GENERAL HOSPITAL CORPORATION 101 HUNTINGTON AVENUE BOSTON, MA 02199 | NONE FELLOWSHIP PROGRAM | PUBLIC CHARITY | 35,000. |

| | | | |
|--|--|-------------------|---------|
| RESEARCH INSTITUTE OF MCGILL UNIVERSITY 2155 GUY STREET, 5TH FLOOR MONTREAL, QUEBEC, CANADA H3H-2R9 | NONE FELLOWSHIP PROGRAM | PUBLIC CHARITY | 5,000. |
| PRO-CHOICE RESOURCES 250 3RD AVE. N, SUITE 625 MINNEAPOLIS, MN 55401 | NONE EDUCATOR'S GUIDE TO SEXUALITY EDUCATION | PUBLIC CHARITY | 20,000. |
| PLANNED PARENTHOOD MID-HUDSON VALLEY 178 CHURCH STREET POUGHKEEPSIE, NY 12601 | NONE SEX ON CAMPUS: A COMPREHENSIVE APPROACH TO RISK-REDU | PUBLIC CHARITY | 25,000. |
| OTTAWA HOSPITAL RESEARCH INSTITUTE 725 PARKDALE AVENUE OTTAWA, ONTARIO, CANADA K1Y 4E9 | NONE FELLOWSHIP PROGRAM | PUBLIC CHARITY | 30,000. |
| NORTH DAKOTA STATE UNIVERSITY P.O. BOX 6050 FARGO, ND 58108 | NONE FELLOWSHIP PROGRAM | PUBLIC CHARITY | 5,000. |
| MAGEE WOMEN'S RESEARCH INSTITUTE 3339 WARD STREET PITTSBURGH, PA 15213 | NONE FELLOWSHIP PROGRAM | PUBLIC CHARITY | 35,000. |
| KANSAS U. MEDICAL CENTER RES. INST. INC. 3901 RAINBOW BLVD., MSN 1039 KANSAS CITY, KS 66160 | NONE FELLOWSHIP PROGRAM | PUBLIC CHARITY | 5,000. |
| HAMPSHIRE COLLEGE 893 WEST STREET AMHERST, MA 01002 | NONE TRAVEL GRANT PROGRAM | PUBLIC CHARITY | 2,000. |
| GORDON RESEARCH CONFERENCES P.O. BOX 984 WEST KINGSTON, RI 02892 | NONE TRAVEL GRANT PROGRAM | PUBLIC CHARITY | 9,500. |
| DUKE UNIVERSITY 2200 WEST MAIN STREET, SUITE 300, BOX 104004 DURHAM, NC 27708 | NONE FELLOWSHIP PROGRAM | PUBLIC CHARITY | 30,000. |

COLUMBIA UNIVERSITY MEDICAL
CENTER
630 WEST 168 STREET, BOX 49 NEW
YORK, NY 10032

NONE
FELLOWSHIP PROGRAM

PUBLIC
CHARITY

30,000.

COLD SPRING HARBOR LAB
1 BUNGTOWN ROAD, P. O. BOX 200
COLD SPRING HARBOR, NY 11724

NONE
TRAVEL GRANT PROGRAM

PUBLIC
CHARITY

5,000.

CINCINNATI CHILDREN'S HOSPITAL
3333 BURNET AVE., MLC 7030
CINCINNATI, OH 45229

NONE
FELLOWSHIP PROGRAM

PUBLIC
CHARITY

30,000.

AMERICAN SOCIETY OF ANDROLOGY
11 E. WOODFIELD ROAD, SUITE 520
SCHAUMBURN, IL 60173

NONE
TRAVEL GRANT PROGRAM

PUBLIC
CHARITY

5,000.

TOTAL TO FORM 990-PF, PART XV, LINE 3A

382,333.

FORM 990-PF

GRANTS AND CONTRIBUTIONS
APPROVED FOR FUTURE PAYMENT

STATEMENT 13

| RECIPIENT NAME AND ADDRESS | RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT | RECIPIENT STATUS | AMOUNT |
|---|--|---------------------|---------|
| VENTURE STRATEGIES INNOVATIONS 2401 EAST KATELLA AVENUE, SUITE 400 ANAHEIM, CA 92806 | NONE ANNA LALOR BURDICK PROGRAM | PUBLIC CHARITY | 25,000. |
| UNIVERSITY OF PITTSBURGH 123 UNIVERSITY PLACE PITTSBURGH, PA 15213 | NONE FELLOWSHIP PROGRAM | PUBLIC CHARITY | 5,000. |
| UNIVERSITY OF MISSOURI 310 JESSE HALL COLUMBIA, MO 65211 | NONE FELLOWSHIP PROGRAM | PUBLIC CHARITY | 5,000. |
| THE GENERAL HOSPITAL CORPORATION 101 HUNTINGTON AVENUE BOSTON, MA 02199 | NONE FELLOWSHIP PROGRAM | PUBLIC CHARITY | 5,000. |
| SOCIETY FOR THE STUDY OF REPRODUCTION 1619 MONROE STREET MADISON, WI 537112063 | NONE TRAVEL GRANT PROGRAM | PUBLIC CHARITY | 8,000. |
| PRINCE HENRY'S INSTITUTE P.O. BOX 5152 3168, AUSTRALIA CLAYTONVIC | NONE FELLOWSHIP PROGRAM | PUBLIC CHARITY | 5,000. |
| OTTAWA HOSPITAL RESEARCH INSTITUTE 725 PARKDALE AVENUE OTTAWA, ONTARIO, CANADA K1Y 4E9 | NONE FELLOWSHIP PROGRAM | PUBLIC CHARITY | 5,000. |
| MAGEE WOMEN'S RESEARCH INSTITUTE 3339 WARD STREET PITTSBURGH, PA 15213 | NONE FELLOWSHIP PROGRAM | PUBLIC CHARITY | 5,000. |

THE LALOR FOUNDATION, INC.

51-6000153

| | | | |
|--|---------------------------------------|-------------------|---------|
| GORDON RESEARCH CONFERENCES P.O. BOX 984 WEST KINGSTON, RI 02892 | NONE TRAVEL GRANT PROGRAM | PUBLIC CHARITY | 500. |
| FRESNO BARRIOS UNIDOS 4415 E TULARE ST FRESNO, CA 93702 | NONE ANNA LALOR BURDICK PROGRAM | PUBLIC CHARITY | 25,000. |
| FAMILY PLANNING COUNCIL OF IOWA 108 3RD ST # 220 DES MOINES, IA 50309 | NONE ANNA LALOR BURDICK PROGRAM | PUBLIC CHARITY | 25,000. |
| DUKE UNIVERSITY 2200 WEST MAIN STREET, SUITE 300, BOX 104004 DURHAM, NC 27708 | NONE FELLOWSHIP PROGRAM | PUBLIC CHARITY | 5,000. |
| COLUMBIA UNIVERSITY MEDICAL CENTER 630 WEST 168 STREET, BOX 49 NEW YORK, NY 10032 | NONE FELLOWSHIP PROGRAM | PUBLIC CHARITY | 5,000. |
| CINCINNATI CHILDREN'S HOSPITAL 3333 BURNET AVE., MLC 7030 CINCINNATI, OH 45229 | NONE FELLOWSHIP PROGRAM | PUBLIC CHARITY | 5,000. |
| CHILDREN'S HOME SOCIETY OF WEST VIRGINIA P.O. BOX 2942 CHARLESTON, WV 25330 | NONE ANNA LALOR BURDICK PROGRAM | PUBLIC CHARITY | 10,000. |

TOTAL TO FORM 990-PF, PART XV, LINE 3B

138,500.

Application Guidelines

The Lalor Foundation postdoctoral fellowship program supports promising new researchers in establishing scientific and teaching careers. The mission of the program is to support these researchers early in their work so that they can become independently funded in the field of mammalian reproductive biology as related to the regulation of fertility.

Eligibility of Institutions and Individuals

U.S. institutions must be exempt from federal income taxes under Section 501(c)(3) of the U.S. Internal Revenue Code and must submit a determination letter from the Internal Revenue Service stating that it is “not a private foundation.”

If the institution is not located in the United States and has not been classified by the Internal Revenue Service, please contact the fellowship manager at GMA Foundations at the address below.

The individual nominated by the applicant institution for the postdoctoral fellowship for conduct of the work may be a citizen of any country. The individual should have training and experience at least equal to the Ph.D. or M.D. level and should not have a faculty appointment (i.e., instructor, lecturer or higher). Potential fellows should not have held the doctoral degree more than two years from receipt of the degree.

The applicant institution may make its nomination of a fellow from among its own personnel or elsewhere, but qualifications being equal, candidates from other than the proposing institution itself may carry modest preference. The application must name the institution's nominee for fellowship and include his or her performance record. Only one application per laboratory/sponsor will be considered.

Financial Data

Fellowships will be \$38,000 per year for coverage of fellowship stipend, fringes and institutional overhead. Institutional overhead may not exceed 10 percent of the total fellowship award. Renewal for one additional year is possible under special circumstances. Please see specific renewal guidelines.

Feel free to contact fellowshipmanager@gmafoundations.com with any questions.

Application Instructions

NEW FOR 2012 APPLICATIONS

This year's deadline is Tuesday, January 17, because of the Martin Luther King holiday.

Lalor Foundation Fellowship Online Registration Guide

Read the Eligibility Guidelines: Before registering, read the guidelines for the postdoctoral fellowship program to be sure that you and your institution are eligible and that your proposed research topic aligns with the foundation's priorities.

Register: Prior to submitting a paper proposal to the Lalor Foundation, applicants must complete a one-time online registration. After completing the registration, you can simply log in.

You will need to supply your contact information and create a password to log in. The foundation prefers that the proposed fellow register.

Be sure to *save your password where you can find it again*. You will need it to work on your application abstract, budget and Appendix C draft and to check the status of your proposal after it is submitted.

Click Apply: After you have registered, click *Apply* on the upper left side of your screen.

Enter Access Code: The Access Code routes your registration information to the foundation. The Access Code is *not* the same as your password. **Enter the code *fellow* (all lowercase) in the Access Code box on the middle left side of your screen.**

Click Link to Open Form: Click Enter to open the application abstract space, budget and Appendix C upload.

Save frequently. If you want to leave your application before it is complete, click on *Save as Draft* at the bottom of the screen; the next screen will confirm that you have saved your application. If you do not see the confirmation, there is an error on your page that needs to be fixed before you can continue. You can come back later and continue by signing in *with your password* and continuing to work on the registration material.

Submit When Complete: Check your registration materials carefully while in draft. You will not be able to make changes to the registration materials after clicking submit. Click *submit* once when you are done in order to remove the material from draft status. After clicking submit, a new screen will appear confirming receipt of the application abstract, budget and Appendix C. If you do not see the confirmation, there is an error on your page that needs to be fixed before you can continue.

This information will become your cover sheet and does not need to be printed and submitted with the rest of your application packet (see below). The foundation will export this information into a cover sheet that will then be added to the rest of your packet, when it is received.

Tips for Using the Registration System

Can't find the application form? If you don't see the application questions, you probably did not enter the access code in the field on the left side of your screen after you registered and logged in.

Make a PDF of your application. If you would like make a pdf of your submission for your own use, use the Print Packet function. You can choose to save or print this pdf for your records. Before clicking "submit," review your application abstract, budget and Appendix C draft.

What is the deadline? The deadline for *receipt* of *all* registration *and* paper application materials is 5:00 p.m. EST on January 15. If January 15 falls on a weekend, the deadline date will be the following Monday.

Did we get it? Once you click *submit*, your registration materials are on their way – *you can't edit your draft any more*. After you submit your registration material, you can log in to check the status of your submission.

Need tech support? Tech support is available between 9:00 a.m. and 4:00 p.m. eastern standard time. Call the Grants Manager at GMA Foundations at 617-391-3085
begin_of_the_skype_highlighting 617-391-3085 end_of_the_skype_highlighting or email online@gmafoundations.com.

Suggestions for improving registration? Write online@gmafoundations.com with comments, tips and ideas that can improve this system. Your feedback helps us make improvements.

Go to the login page: Click the link to go to the online registration portal to prepare your application abstract, budget and Appendix C.

<https://www.grantinterface.com/gma/Common/LogOn.aspx>

After You Have Completed Your Online Registration, Continue With the Body of the Application Below.

INSTRUCTIONS FOR POSTDOCTORAL FELLOWSHIP APPLICATION

After completing the online registration, please continue with the body of the application, which should be filled out completely and submitted with the 2 Appendices described below.

1. The proposed fellow is responsible to see that the signed, completed application and all supporting information is RECEIVED by the foundation not later than 5:00 p.m. on January 15 each year. In the event that January 15 falls on a weekend or holiday, the next working day is the deadline date.
2. The application and all material submitted should be typewritten on 8 1/2" x 11" or A4 paper. Please do not change the font size or margins of the forms provided. The narrative portion of the application should have 1" margins all the way around, except that applicants using A4 paper should leave 1.5" at the bottom of each page. The prospective fellow's name should appear in the upper right hand corner of each page. Forms are available online, but proposals should be submitted in hard copy.

3. The application should be accompanied by the applicant's official transcript. The applicant should also complete the NIH Biographical Sketch form.
4. One original and 4 copies of the application and accompanying documents should be addressed to the Fellowship Manager, The Lalor Foundation, Inc., c/o GMA Foundations, 77 Summer Street, 8th Floor, Boston, MA 02110-1006 USA. To reduce the volume of paper, please *print double sided whenever possible*. Applications should be held by clips or rubber bands, no staples please; folders, report covers, or other types of binders do not fit files and are discarded.

APPENDICES: The paper application consists of three appendices as follows:

Appendix A – Project Narrative (5 pages only including figures and references)

1. The plan of work for the project should concisely describe the present state of knowledge regarding the problem, the scope, specific objectives and importance of the work which will be accomplished during the period.
2. Please outline in what fashion this research can potentially be applied to the regulation of human fertility or to a method of birth control. This information may be helpful in making a choice between applications which are equally attractive from a purely scientific point of view.

Appendix B – Letters of Support (Send 1 confidential, sealed envelope of each. Letters will be opened and copied at the foundation.)

1. Independent Expert Reviews: The applicant should contact two independent experts who will review the proposal, comment on its scientific merit and give their opinion of the ability of the lab to supervise and support the project. These reviewers should be experts in the field who do not know the applicant personally and should state their own qualifications to perform the review. Representatives of any institutional unit that stands to receive financial benefit from a fellowship are not considered to be independent reviewers. Preference is for reviewers from outside the applicant's institution. The instructions and form included in this application material should be sent to the expert reviewers. These letters are not required of renewal applicants.

2. Reference: The applicant should also submit one letter of reference from someone who does know the applicant's work and who can comment on the applicant's abilities as a researcher. This should not be the person who will be the mentor/sponsor on the project but, rather, someone like a dissertation advisor or committee member. Representatives of any institutional unit that stands to receive financial benefit from a fellowship are not considered to be appropriate references. The instructions and form included in this application material should be sent to the reference. This letter is not required for renewal applicants.

3. The applicant should request a **letter from the proposed sponsor/mentor** outlining in layman's terms the relevance/importance of the project to the foundation's focus; the training/experiences during the project that will assist the fellow to apply successfully for continuing funding and to progress toward independence; the ability of the fellow to carry out the proposed project. The sponsor/mentor should prepare the letter of support utilizing the

instructions included in this application material. See below for renewal applicants' sponsor/mentor letter.

All letters should be sent *to the applicant* for inclusion in the proposal packet. These letters should be on the forms provided in these instructions and in sealed envelopes, marked "Confidential," and signed by the reviewer across the envelope flap. All letters of support should include the NIH Biographical Sketch of the person writing the review. Proposals are not complete without these letters. Please plan ahead; emailed letters are not confidential and are not acceptable. In fairness to all applicants, do not include extra letters of support.

Appendix C – Institutional Representation

This appendix is the final part of the online registration materials and sets forth information concerning the institution's eligibility to receive grants under U.S. tax laws and approvals of the project by reviewing bodies. Please print Appendix C and include with the application materials.

The application forms can be found [here](#).

Renewal Applications

Fellowship renewals are not automatic; renewal applications are reviewed along with the pool of new applicants.

1. Update your online application information. (See instructions above.) Print an original and 4 copies of Appendix C and include it with your application packet.
2. Submit an original and 4 copies of your progress report on the project thus far and a narrative description of the work planned for a second year, not exceeding five pages including figures and references.
3. Your sponsor should report in layman's terms on progress toward the mentoring and training activities planned for the first year. The sponsor should indicate:
 - the relevance/importance of the project's potential second year to the foundation's focus on the regulation of fertility,
 - comment on the first year's work, including how much of the first-year project was accomplished and what training took place in the first year,
 - barring unforeseen circumstances, how likely is it that the proposed work can be accomplished within the term of the fellowship?
 - the training/experiences during a second year that will assist the fellow to progress toward successful funding and independence,
 - and the fellow's ability to accomplish the goals of the proposed project.
4. Additional letters of reference are not required for renewal applications.
5. Both the renewal applicant and sponsor should submit their updated NIH Biographical Sketches.

Application Guidelines

Guidelines

Mission and Purpose

The Anna Lalor Burdick Program seeks to educate young women about healthy reproduction in order to broaden and enhance their options in life.

The program focuses particularly on young women who have inadequate access to information regarding sexual and reproductive health, including comprehensive and unbiased information on contraception and pregnancy termination.

Eligibility

To be eligible applicants must be tax exempt under section 501(c)(3) of the U.S. Internal Revenue Service Code and defined as “not a private foundation” under section 509(a) of the Code.

While projects may take place outside the U.S., the Anna Lalor Burdick program will only fund organizations based in the United States.

Funding Interests

- Programs for young women, particularly those who are disadvantaged by poverty, discrimination, geographic isolation, or other factors leading to inadequate reproductive health education
- Programs that include a comprehensive approach to sexual and reproductive health education
- Programs that include novel ideas, including innovative methods of delivering information
- Programs at new or smaller organizations, including those with a grassroots base, that are capable of delivering excellent services
- Well defined projects at larger organizations if they add a new dimension or capability
- Programs that will be exemplars for replication if successful
- Programs that will be economically sustainable if they succeed

Selection Preferences

- Sexual and reproductive health education should be the centerpiece of the program’s work
- Expanding young women’s reproductive options should be the target, but the program may involve young men as well for that purpose
- New programs or innovation in successful existing programs
- Well developed plans for sustainability
- Clear definition of project goals and intended outcomes and a feasible plan to assess impact and success
- Collaborative efforts, including evidence of participation by proposed partner organizations
- Demonstration of plans to share outcomes and successful techniques or products

Geographic Focus

The program has no geographic limits.

Funding Availability and Duration

The trustees award a small number of grants in the range of \$10,000 to \$50,000, with an average grant size between \$20,000 and \$25,000.

Grants are awarded for one year. On rare occasions, trustees invite follow-up work to a project that has shown outstanding results or promise during its first year.

Areas Where Grants Are Not Normally Made

To individuals, or for individual research projects and scholarships

To requests for endowment or major capital support

General operating support for ongoing programs

Application Procedures

The first step in applying for a grant is to submit an online concept paper. Instructions for preparing an online concept application are found at the Application Instructions tab on the left side of this screen. Concept papers are submitted online only.

If your concept paper is approved by the trustees, you will be invited to submit a full proposal.

Deadlines

Deadlines for concept papers are May 1 and November 1. The online portal will open one month prior to the concept paper deadline.

Applicants will be informed within 6-8 weeks of the deadline date of the trustees' decision regarding the concept paper.

Applicants invited to submit a full proposal will receive a full set of instructions to assist in preparation of a full online proposal.

Online Application Guide

First Read the Anna Lalor Burdick Program guidelines to determine your eligibility.

Register Prior to submitting a concept application through the foundation's online grants system, applicants must complete a one-time registration. Previously registered applicants can simply log in. You only need to register once for all GMA Foundations clients. Please do not register your organization more than once.

To register, you will need to supply your contact information and create a password to log in to the system.

The foundation prefers that the principal investigator or primary contact register.

Be sure to *save your password* where you can find it again. You will need it to work on proposal drafts and

to submit reports if you receive a grant.

If you are a grant writer, please register using the name and email address of the principal investigator or

primary contact at the organization for which you are applying. If you use your own information, the organization information will be linked to your email address, which will cause a problem if you then try to fill

out an application for another organization or if you move on and the organization wishes to re-apply or submit a report.

Click Apply Once you are in the system, click *Apply* on the top left side of your screen, see illustration.

Enter Access Code The Access Code routes your proposal to the foundation. Each of GMA's foundation

clients has its own Access Code, it is *not* the same as your password. Enter the code: *albconcept*(all lowercase) in the Access Code box on the middle left side of your screen.

Click Link to Open Form Click Enter to open the application form. If you would like to review the questions prior to starting your application, click on Print Question Legend, located above your name, to get a list of the proposal questions.

Draft Application Complete your online application. Save frequently. If you want to leave your application before it is complete, click on Save as *Draft* at the **bottom** of the page; the next screen will confirm that you have saved your application. If you do not see the confirmation, there is an error on your page that needs to be fixed before you can continue. You can come back later and continue your application by signing in with your *password* and continuing to work on the application.

Submit When Complete Your application must be submitted when you are done in order to remove it from draft status. After clicking Submit, a new screen will appear confirming receipt of your application. You cannot make changes after submitting your application. If you do not see the confirmation, there is an

error on your page that needs to be fixed before you can continue.

Page 2 of 2

Click here to link to the online concept paper application

<https://www.grantinterface.com/Common/LogOn.aspx?eqs=3QVk173peTkm1XKlbu7wUg2>

Tips for Using the System

Can't find the application form? If you don't see the link to the application form, you probably did not enter the access code in the field on the left side of your screen after you registered and logged in.

Make a PDF of your proposal. If you would like to make a pdf of your submission, use the Print Packet function. You can choose to save or print this pdf for your records.

Uploading? The upload fields

accept only one document. If you

upload the wrong document, simply

browse and upload the right one to overwrite the incorrect upload. Once you see the name of the document you want to upload in the grey box, scroll to the bottom of the page and click Save as Draft. You

will know that the upload worked when you see the document link below the grey box. You will also see it when you use the Print Packet function.

Cutting and pasting is fast. Cutting and pasting directly from your word processor is easy if you keep in mind that 3,200 characters (including spaces) equal approximately one page with four paragraphs in 12 point type. To facilitate cutting and pasting, text limits are typically generous, but do not feel compelled to write more than necessary just to use all of the characters allowed. **Please note:** If you choose to cut and paste, hit the space bar after pasting to ensure the system counts your characters properly.

Forget formatting. The system removes all formatting from your pasted text. It will turn bullets into gibberish. Saving your documents in RTF before you paste will require less clean-up in your proposal.

What is the deadline? The Anna Lalor Burdick Program has two application rounds per year. The deadlines are May 1 and November 1 with a firm receipt time before 12:00 midnight Eastern Time on the date specified. If the deadline dates fall on a weekend or holiday, the date is extended to the next regular working day.

Did we get it? Once you click Submit, your proposal is on its way. Log in to check the status of your proposal submission. If you see Awaiting Foundation Action beside the project name, your proposal was submitted properly.

Need tech support? Tech support is available between 9:00 a.m. and 4:00 p.m. Eastern Time. Call the Grants Manager at GMA Foundations at 617-391-3085 or email online@gmafoundations.com.

Have suggestions? Write online@gmafoundations.com with comments, tips and ideas that can improve this system. Your feedback helps us make improvements.

Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

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

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

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

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

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

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

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

| | | |
|---|--|---|
| Type or print | Name of exempt organization THE LALOR FOUNDATION, INC. | Employer identification number 51-6000153 |
| File by the due date for filing your return. See instructions | Number, street, and room or suite no. If a P.O. box, see instructions. 77 SUMMER STREET, 8TH FLOOR | |
| | City, town or post office, state, and ZIP code. For a foreign address, see instructions BOSTON, MA 02110 | |

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

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

GMA FOUNDATIONS

- The books are in the care of ► **77 SUMMER STREET, 8TH FLOOR - BOSTON, MA 02110**

Telephone No. ► **617-426-7080**

FAX No. ►

- If the organization does not have an office or place of business in the United States, check this box ☐

- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **MAY 15, 2012**, to file the exempt organization return for the organization named above. The extension is for the organization's return for
- ☐ calendar year or
- ☒ tax year beginning **OCT 1, 2010**, and ending **SEP 30, 2011**

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

| | | | |
|---|-----------|----|--------|
| 3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions. | 3a | \$ | 0. |
| b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit | 3b | \$ | 2,694. |
| c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions. | 3c | \$ | 0. |

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

LHA **For Paperwork Reduction Act Notice, see Instructions.**

Form **8868** (Rev. 1-2011)