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Form **990-PF** Department of the Treasury Internal Revenue Service

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

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

OMB No 1545-0052

For	calen	dar year 2011 or tax year beginning		, and ending	
		foundation			A Employer identification number
J	os	eph L. Sweeney Charitab	le Foundation	n	
C	/0	Glynn&Glynn			04-6036659
Nur	nber a	nd street (or P O box number if mail is not delivered to street	address)	Room/suite	B Telephone number
1	0	Union Street			508-655-4460
City	or to	own, state, and ZIP code	· · · · · · · · · · · · · · · · · · ·		C If exemption application is pending, check here
		ick, MA 01760			
		all that apply: Initial return	Initial return of a fo	ormer public charity	D 1. Foreign organizations, check here
		Final return	Amended return		
		Address change	Name change		Foreign organizations meeting the 85% test, 2. check here and attach computation
H (heck	type of organization: X Section 501(c)(3) ex	cempt private foundation		E If private foundation status was terminated
	_		Other taxable private founda	ition	under section 507(b)(1)(A), check here
I Fa		rket value of all assets at end of year J Accounti		Accrual	F If the foundation is in a 60-month termination
		· —	her (specify)		under section 507(b)(1)(B), check here
	\$	424175 . (Part I, colu		pasis.)	
		Analysis of Revenue and Expenses	(a) Revenue and	(b) Net investment	(c) Adjusted net (d) Disbursements
		(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)	expenses per books	income	income for charitable purposes (cash basis only)
	1	Contributions, gifts, grants, etc., received			(000, 000, 000, 000, 000, 000, 000, 000
	2	Check X if the foundation is not required to attach Sch B		· · · · · · · · · · · · · · · · · · ·	1907 8 3 XXX 7 1
	3	Interest on savings and temporary cash investments	12.	12	
	4	Dividends and interest from securities	14127.	14127	
	l *	Gross rents			TTTT// DCGComerc
	Ι.	Net rental income or (loss)	1,000 j. Tark j		
JMNR GORDO	l	Net gain or (loss) from sale of assets not on line 10	4133.	,	DEOEN CE
	h	Gross sales price for all 11622	4133.		+ RECEIVED
	7	assets on line 6a		4133	· c
	Ŕ	Net short-term capital gain		4100	MAY 1 8 2012
	q	Income modifications			
m	10a	Gross sales less returns and allowances			00000
		Less Cost of goods sold			L OGDEN, U
S		Gross profit or (loss)			
~	11	Other income			
	12	Total. Add lines 1 through 11	18272.	18272	. 14139.
	13	Compensation of officers, directors, trustees, etc	0.	0	
3	14	Other employee salaries and wages			
3	15	Pension plans, employee benefits		-	
Ses Ses	ı	Legal fees		·	
ens	h	Accounting fees Stmt 3	1000.	0	. 0. 0.
Ϋ́	c	Other professional fees Stmt 4	6400.	0	
Ve E	17	Interest			
Operating and Administrative Expenses	18	Taxes			
	19	Depreciation and depletion			
πi	20	Occupancy			
Adr	21	Travel, conferences, and meetings		·····	
P	22	Printing and publications			
<u>a</u>	23	Other expenses			
atin.	24	Total operating and administrative			
Jer.	١	expenses. Add lines 13 through 23	7400.	0	. 0. 0
ŏ	25	Contributions, gifts, grants paid	20000.		20000
	26	Total expenses and disbursements.			
		Add lines 24 and 25	27400.	0	. 0. 20000
	27	Subtract line 26 from line 12:	2,100		
		Excess of revenue over expenses and disbursements	-9128.		
		Net investment income (if negative, enter -0-)		18272	
	l	Adjusted net income (if negative, enter -0-)			14139.
1005	- 		•———		

Joseph L. Sweeney Charitable Foundation

		30-PF (2011) C/O GIVIIIAGIVIII	Beginning of year		f vear
P	art	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	2	Cash - non-interest-bearing Savings and temporary cash investments Accounts receivable ►			
		Less: allowance for doubtful accounts ▶			
	4	Pledges receivable -	•	* (* *	
	_	Less: allowance for doubtful accounts	.		
	1	Grants receivable Receivables due from officers, directors, trustees, and other			
	"	disqualified persons			
	7	Other notes and loans receivable	*	. 5. 6	
		Less: allowance for doubtful accounts	, ,		,
ţ	8	Inventories for sale or use			
Assets	9	Prepaid expenses and deferred charges			
⋖		Investments - U.S. and state government obligations			
	I	Investments - corporate stock Stmt 5	72716.	63588.	424175.
		Investments - corporate bonds			·
	11	Investments - land, buildings, and equipment basis			. ~
	40	Less accumulated depreciation			
	12	Investments - mortgage loans Investments - other			
		Land, buildings, and equipment: basis	- ,		
		Less accumulated depreciation		· • • · • · ·	
	15	Other assets (describe ►)			
_	16	Total assets (to be completed by all filers)	72716.	63588.	424175.
	i	Accounts payable and accrued expenses			7, 7, 7, 7, 7, 7, 7, 7, 7, 7, 7, 7, 7, 7
	18	Grants payable			2.
ties	19	Deferred revenue			•
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons Mortgages and other notes payable			
Ë	ı	Other liabilities (describe)			
		,			-
_	23	Total liabilities (add lines 17 through 22)	0.	0.	
		Foundations that follow SFAS 117, check here			
ø		and complete lines 24 through 26 and lines 30 and 31.			
nce	24	Unrestricted			
3ala	25	Temporarily restricted			
or Fund Balances	26	Permanently restricted Foundations that do not follow SFAS 117, check here			_
Ē		and complete lines 27 through 31.			•
S	27	Capital stock, trust principal, or current funds	92962.	92962.	
set	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	,
Net Assets	29	Retained earnings, accumulated income, endowment, or other funds	-20246.	-29374.	, ,
Š	30	Total net assets or fund balances	72716.	63588.	
		*	72716	63500	
Ξ		Total liabilities and net assets/fund balances	72716.	63588.	<u> </u>
LP —	art	Analysis of Changes in Net Assets or Fund Ba	aiances 		
1		I net assets or fund balances at beginning of year - Part II, column (a), line	30		
	•	st agree with end-of-year figure reported on prior year's return)		1	72716.
		r amount from Part I, line 27a	•	2	-9128.
		r increases not included in line 2 (itemize)		3	63500
		lines 1, 2, and 3 reases not included in line 2 (itemize)		5	63588.
		I net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	lumn (b), line 30	6	63588.
<u>~</u>	· ota	. The access of form balances at one of your time 4 million into of Fall it, to	to M will no		Form 990-PF (2011)

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Part IV Capital Gains	and Lo	sses for Tax on In	vestment	Income					
2-story brick wa	ribe the ki rehouse;	nd(s) of property sold (e.g. or common stock, 200 shs	., real estate, s. MLC Co.)		(b) D	How acquired - Purchase - Donation	(c) Date ad (mo., day		(d) Date sold (mo., day, yr.)
1a Centurylink					<u> </u>	P			
<u>b Nstar</u>					_	P		_	
<u>c</u>		·			<u> </u>			-	
<u>d</u>					 				
(e) Gross sales price	(f)	Depreciation allowed (or allowable)		st or other basis xpense of sale	L			n or (loss (f) minus	
a 37.		· · · · · · · · · · · · · · · · · · ·	· · · · · · · · · · · · · · · · · · ·						37.
ь 11596.		-		750	0.				4096.
С						_			
d									
<u>e</u>									
Complete only for assets showing		· · · · · · · · · · · · · · · · · · ·					(I) Gains (Co ol. (k), but no	ıl. (h) gaın	minus
(i) F.M.V. as of 12/31/69		(j) Adjusted basis as of 12/31/69	()	cess of col. (ı) col. (ı), ıf any			Losses (1	from col. ((h))
<u>a</u>									37.
ь						_			4096.
_с									
<u>d</u>									
e									
2 Capital gain net income or (net ca	pital loss	If gain, also enter $\left\{\begin{array}{l} \text{If gain, also enter} \\ \text{If (loss), enter -0-} \end{array}\right.$			}	2			4133.
3 Net short-term capital gain or (los If gain, also enter in Part I, line 8,			ıd (6):		J				
If (loss), enter -0- in Part I, line 8	•				ŗ	3			0.
Part V Qualification U	nder S	Section 4940(e) for	Reduced	Tax on Net	Inv	estment Ir	come		
(For optional use by domestic private	foundati	ons subject to the section 4	1940(a) tax on	net investment ir	com	e.)			
If section 4940(d)(2) applies, leave the	ns part bl	ank.							
Was the foundation liable for the sect	tion 4942	tax on the distributable am	ount of any ve	ear in the base pe	rıod?				Yes X No
If "Yes," the foundation does not qual				•					
1 Enter the appropriate amount in e					es.				
(a) Base period years Calendar year (or tax year beginnii	ng in)	(b) Adjusted qualifying dis	tributions	Net value of no	(c) oncha	rıtable-use asse	ts (c	Dıstrıl col. (b) dıv	(d) bution ratio vided by col. (c))
2010			17366.			34522	9.		.050303
2009			15358.			34475	2.		.044548
2008			17000.			45907			.037031
2007			19000.			47313			.040158
2006			<u>17500.</u>			39288	0.		.044543
2 Total of line 1, column (d)							2		.216583
3 Average distribution ratio for the state the foundation has been in existent			on line 2 by 5,	or by the number	of ye	ears	3		.043317
4 Enter the net value of noncharitab		•	line 5				4		387026.
	no uae da	outo iui zu i i iiulii Fail A,	mio J						
5 Multiply line 4 by line 3							5		16765.
6 Enter 1% of net investment incom	ne (1% of	FPart I, line 27b)					6		183.
7 Add lines 5 and 6							7		16948.
8 Enter qualifying distributions from	n Part XII	, line 4					8		20000.
If line 8 is equal to or greater than See the Part VI instructions.	n line 7, c	heck the box in Part VI, line	t 1b, and comp	olete that part usi	ng a 1	% tax rate.			
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Joseph L. Sweeney Charitable Foundation 04-6036659 C/O Glynn&Glynn Form 990-PF (2011) Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions) Part VI 1a Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1. (attach copy of letter if necessary-see instructions) Date of ruling or determination letter: 183. b Domestic foundations that meet the section 4940(e) requirements in Part V, check here 🕨 🗶 and enter 1% of Part I, line 27b c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b). 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 0. 3 183. 0. 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 183. Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-5 6 Credits/Payments: a 2011 estimated tax payments and 2010 overpayment credited to 2011 6a **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 7 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here _____ if Form 2220 is attached 8 183. 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 Refunded 11 Enter the amount of line 10 to be: Credited to 2012 estimated tax Part VII-A Statements Regarding Activities Yes Nο 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in 1a any political campaign? b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 1b If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities. c Did the foundation file Form 1120-POL for this year? 1c d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: 0 • (1) On the foundation. ▶ \$ 0 . (2) On foundation managers. ► \$ e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. > \$ X 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? 2 If "Yes," attach a detailed description of the activities 3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 4a N/A b If "Yes," has it filed a tax return on Form 990-T for this year? 4b X 5 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T. 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: · By language in the governing instrument, or By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? 6 X 7 Did the foundation have at least \$5,000 in assets at any time during the year? 7 If "Yes," complete Part II, col. (c), and Part XV. 8a Enter the states to which the foundation reports or with which it is registered (see instructions) 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 8Ь 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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresse 10

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Joseph L. Sweeney Charitable Foundation 04-6036659 C/O Glynn&Glynn Page 5 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 X section 512(b)(13)? If "Yes." attach schedule (see instructions) 12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions) 12 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 13 N/AWebsite address > Telephone no. $\triangleright 508-655-4460$ 14 The books are in care of ▶ Steven J. Glynn ZIP+4 ▶<u>0176</u>0 Located at ▶10 Union Street, Natick, MA 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 16 At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, Yes No X 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 Part VII-B | Statements Regarding Activities for Which Form 4720 May Be Required Yes No File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a During the year did the foundation (either directly or indirectly): Yes X No (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) Yes X No a disqualified person? Yes X No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available Yes X No for the benefit or use of a disqualified person)? (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 Yes X No termination of government service, if terminating within 90 days.) 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 instructions)? 1b Organizations relying on a current notice regarding disaster assistance check here c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected X before the first day of the tax year beginning in 2011? 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(1)(3) or 4942(1)(5)): a At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning Yes X No before 2011? If "Yes," list the years ▶ b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach N/A 2b statement - see instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.

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4a

X

N/A

during the year?

3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time

4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?

Form 4720, to determine if the foundation had excess business holdings in 2011.)

had not been removed from jeopardy before the first day of the tax year beginning in 2011?

b If "Yes," did it have excess business holdings in 2011 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,

b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that

Joseph L. Sweeney Charitable Foundation C/O Glynn&Glynn 04-6036659 Form 990-PF (2011) Page 6 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: Yes X No (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly. Yes X No any voter registration drive? Yes X No (3) Provide a grant to an individual for travel, study, or other similar purposes? (4) Provide a grant to an organization other than a charitable, etc., organization described in section Yes X No 509(a)(1), (2), or (3), or section 4940(d)(2)? (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for Yes X No the prevention of cruelty to children or animals? b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations N/A 5b 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 N/A expenditure responsibility for the grant? 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 Yes X No a personal benefit contract? 6b b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870. Yes X No í & 7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? 7b b. If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors 1 List all officers, directors, trustees, foundation managers and their compensation. (d) Contributions to employee benefit plans and deterred compensation (c) Compensation (b) Title, and average hours per week devoted to position (e) Expense account, other (If not paid, enter -0-) (a) Name and address allowances Steven J. Glynn Trustee 10 Union Street 0 0 0. Natick, MA 01760 1.00 2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE." (d) Contributions to employee benefit plans and deferred (b) Title, and average (e) Expense account, other hours per week devoted to position (a) Name and address of each employee paid more than \$50,000 (c) Compensation allowances NONE

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

Joseph L. Sweeney Charitable Foundation

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Part VIII Information About Officers, Directors, Trustees, For Paid Employees, and Contractors (continued)	undation Managers, Highly	
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
Steven J. Glynn	Trustee	
10 Union Street, Natick, MA 01760	Fee/Investment Fee	6400.
-		
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 releval number of organizations and other beneficiaries served, conferences convened, research pap	nt statistical information such as the ers produced, etc.	Expenses
1 N/A		
2		,
3		
		<u></u>
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		
All other program-related investments. See instructions.		
3		

Total. Add lines 1 through 3

Joseph L. Sweeney Charitable Foundation C/O Glynn&Glynn

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndations	, see instructions)
- 1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
	Average monthly fair market value of securities	1a	399895.
	Average of monthly cash balances	1b	
	Fair market value of all other assets	1c	
-	Total (add lines 1a, b, and c)	1d	399895.
	Reduction claimed for blockage or other factors reported on lines 1a and		
Ĭ	1c (attach detailed explanation) 1e 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	_0.
3	Subtract line 2 from line 1d	3	399895.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	12869.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	387026.
6	Minimum investment return. Enter 5% of line 5	6	19351.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations check here and do not complete this part.)	nd certain	
1	Minimum investment return from Part X, line 6	1	19351.
2a	Tax on investment income for 2011 from Part VI, line 5	~ (···· <u> </u>
_ b	Income tax for 2011. (This does not include the tax from Part VI.)	1	
c	Add lines 2a and 2b	2c	183.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	19168.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	19168.
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	19168.
_	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a		1a	20000.
þ	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	20000.
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	183.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	19817.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation 4940(e) reduction of tax in those years.	qualifies t	for the section

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C/O Glynn&Glynn

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
Distributable amount for 2011 from Part XI,		-		
line 7				<u> 19168.</u>
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only			1223.	
b Total for prior years:				
		0.		
3 Excess distributions carryover, if any, to 2011:				
a From 2006				
b From 2007			,	
c From 2008	`			
d From 2009				
e From 2010	0.			
f Total of lines 3a through e				
4 Qualifying distributions for 2011 from				
Part XII, line 4: ► \$ 20000.			1223.	
a Applied to 2010, but not more than line 2a			1223.	
b Applied to undistributed income of prior	-			
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus	0			
(Election required - see instructions)	0.			18777
d Applied to 2011 distributable amount		***		10///
e Remaining amount distributed out of corpus	0.			0.
Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			
6 Enter the net total of each column as indicated below:				
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 2010. Subtract line				
4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2011. Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2012				391
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 2006				
not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2012.				
Subtract lines 7 and 8 from line 6a	0.			
0 Analysis of line 9:				
a Excess from 2007				
b Excess from 2008				-
c Excess from 2009				
d Excess from 2010				
e Excess from 2011				5 000 DE (004)

Joseph L. Sweeney Charitable Foundation 04-6036659 Form 990-PF (2011) C/O Glynn&Glynn Page 10 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 2011, enter the date of the ruling b Check box to indicate whether the foundation is a private operating foundation described in section 4942(ı)(3) or 4942(1)(5) Prior 3 years Tax year 2 a Enter the lesser of the adjusted net (b) 2010 (c) 2009 (d) 2008 (e) Total (a) 2011 income from Part I or the minimum investment return from Part X for each year listed **b** 85% of line 2a c Qualifying distributions from Part XII, line 4 for each year listed d Amounts included in line 2c not used directly for active conduct of exempt activities e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c Complete 3a, b, or c for the alternative test relied upon: a "Assets" alternative test - enter: (1) Value of all assets (2) Value of assets qualifying under section 4942(j)(3)(B)(i) b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed c "Support" alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) (3) Largest amount of support from an exempt organization (4) Gross investment income Part XV | Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.) 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 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here Lift 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: Steven J. Glynn, 508-655-4460 10 Union Street, Natick, MA 01760 b The form in which applications should be submitted and information and materials they should include:

LE:

Academic Record

c Any submission deadlines:

F(2011) C/O Glynn&Glynn

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Part XV Supplementary Information	(continued)			
3 Grants and Contributions Paid During the Y		Payment		_ _
Recipient	If recipient is an individual, show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient		
a Paid during the year				
Bentley University	none	Private	Education	
175 Forest Street				
Waltham, MA 02452			Education	2500,
Catholic University of America	none	Private	Education	
620 Michigan Ave. NW				
Washington, DC				5000.
University of Massachusetts-Dartmouth	none	Private	Education	
285 Old Westport Road				2500
N.Dartmouth, MA 02747				2300_1
Norwich University	None	Private	Education	
158 Harmon Drive				2502
Northfield , VT 05663				2500.
University of Massachusetts	none	Private	Education	
Amherst MA 01003				2500
Total See con	tinuation shee	et(s)	► 3a	20000
b Approved for future payment				
None				
			,	
				
	<u></u>		.	
Total			<u>▶ 3b</u>	0 rm 990-PF (2011)

Part XVI-A	Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelate	d business income		ed by section 512, 513, or 514	(e)
•	(a)	(b)	(C) Exclu-	(d)	Related or exempt
1 Program service revenue:	Business code	Amount	sion	Amount	function income
a					<u> </u>
b					
c		•	1		
d	_				
e					
f		-	1		
g Fees and contracts from government agencies	_				
2 Membership dues and assessments			1 1		
3 Interest on savings and temporary cash					
investments					12.
4 Dividends and interest from securities			1 1		14127.
5 Net rental income or (loss) from real estate:	Say.	har har ship ship of	· `&\s^{\sigma}_{\sigma} \}	14 % 15 Q 5 11	· · · · · · · · · · · · · · · · · · ·
a Debt-financed property	· · ·		 		•.••
b Not debt-financed property					
6 Net rental income or (loss) from personal			1		
property 7 Other investment income			1		
• • • • • • • • • • • • • • • • • • • •			1		
8 Gain or (loss) from sales of assets other					4133.
than inventory			1 1		4133.
9 Net income or (loss) from special events			+ +		
10 Gross profit or (loss) from sales of inventory			++		
11 Other revenue:					
a	— 		+		
b	_		++		
<u> </u>	_		1		·
d	_		++		
e					10070
12 Subtotal. Add columns (b), (d), and (e)	•	0.	7,	0.	18272.
13 Total. Add line 12, columns (b), (d), and (e)				13	18272.
(See worksheet in line 13 instructions to verify calculations	.)				
Part XVI-B Relationship of Activitie	s to the Acc	omplishment of E	xempt	Purposes	
			A		-1-1
Explain below how each activity for which in the foundation's exempt purposes (other the			A CONTID	uted importantly to the accomp	piisnment oi
the foundation's exempt purposes (other in	nan by providing to	ilius ioi sucii puiposes).		 	
-					
				····	· · · · · · · · · · · · · · · · · · ·

123621 12-02-11

_		Exempt Organ	izations					
1	Did the or	ganization directly or indir	rectly engage in any of the followin	g with any other organization	described in section 501(c) of		Yes	No
	the Code ((other than section 501(c))(3) organizations) or in section 52	7, relating to political organization	ations?			
а	Transfers	from the reporting founda	ation to a noncharitable exempt or	ganization of:				
	(1) Cash					1a(1)		<u>X</u>
	(2) Other	assets				1a(2)		_X_
b	Other tran	sactions:				1		,
	(1) Sales	of assets to a noncharital	ble exempt organization			1b(1)		<u>X</u>
	(2) Purch	nases of assets from a noi	ncharitable exempt organization			1b(2)		X
	(3) Renta	al of facilities, equipment, (or other assets			1b(3)		_X_
	(4) Reiml	bursement arrangements				1b(4)		_X_
	(5) Loans	s or loan guarantees				15(5)	_	<u>X</u>
	(6) Perfo	rmance of services or me	mbership or fundraising solicitatio	ns		1b(6)		<u>X</u>
	_		iling lists, other assets, or paid em			1c		_X_
d					ays show the fair market value of the goods, o		ets,	
				ed less than fair market value	in any transaction or sharing arrangement, s	now in		
<u>(a)</u>	·	(b) Amount involved	other assets, or services received. (c) Name of noncharitable	exempt organization	(d) Description of transfers, transactions, and	haring an	rangeme	ntc.
(4)	-11010	(b) Amount involved	N/A	oxempt organization	(a) Description of Parisiers, Parisactions, and	मानामापुर्वा	angente	nts
			N/A					
		 						
_								
			<u> </u>					
						•		
							-	
				<u> </u>				
			<u> </u>		<u> </u>			
2a		=	tly affiliated with, or related to, one		ations described	_	_	_
			r than section 501(c)(3)) or in sect	tion 527?	L	Yes	LX	No
b	If Yes, co	omplete the following sch		(L) Time of average trans	(a) December of relational			
		(a) Name of org	Janization	(b) Type of organization	(c) Description of relations	iip 		
		N/A						
	· <u> </u>					-		
								
				 				
					tatements, and to the best of my knowledge	. Ab. 150	d	
Si	ign and be	elief, it is true, correct, and cor	mplete Declaration of preparer (other tha	n taxpayer) is based on all information	tion of which preparer has any knowledge Marrett	the IRS rn with th wn below	aiscuss prepa	this rer
	ere	CX	-10 // 1 NAT	6-10-19		Yes]" _{No}
	Sign	nature of officer or trustee		Date	Title			
		Print/Type preparer's na	ame Preparer's s		Date Check If PTIN			
		1		DI MON !	self- employed			
	aid	GLYNN & GL	YNN	V////	Self-employed PO	1409	086	·
	reparer	Firm's name ► GLY		1	Firm's EIN ► 04-3			
U	se Only			·				
			UNION STREET					
		NA NA	TICK, MA 01760		Phone no. 508 -			
					Fo	rm 99 0)-PF	(2011)

Joseph L. Sweeney Charitable Foundation C/O Glynn&Glynn

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Part XV Supplementary Information				
3 Grants and Contributions Paid During the Yo	ear (Continuation)	 _		
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient		
College of the Holy Cross	none	Private	Education	
1 College Street				,
Worcester MA 01610				5000.
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Form 990-PF Interest on Savi	ngs and Tem	porary Ca	sh In	vestments	Statemer	it 1
Source					Amour	ıt
Merrill Lynch				•		12.
Total to Form 990-PF, Part I,	line 3, Co	lumn A				12.
Form 990-PF Dividend	ls and Inter	est from	Secur	ities	Statemer	nt 2
Source	Gross	Amount		tal Gains vidends	Column Amour	
Merrill Lynch		14127.		0.	1	L 4 127.
Total to Fm 990-PF, Part I, l	.n 4	14127.		0.		L 4127.
Form 990-PF	Accounti	ng Fees			Statemer	nt 3
Description	(a) Expenses Per Books	(b) Net Inve		(c) Adjusted Net Incom	Char	i) itable poses
Accounting	1000.		0.		0.	0.
- To Form 990-PF, Pg 1, ln 16b =	1000.		0.		0.	0.
Form 990-PF C	other Profes	sional Fe	es		Statemen	nt 4
Description	(a) Expenses Per Books	(b) Net Inve		(c) Adjusted Net Incom	l Char:	i) itable poses
Investment	6400.		0.		0.	0.
To Form 990-PF, Pg 1, ln 16c	6400.		0.		0.	0.

Form 990-PF	Corporate Stock		Statement	5
Description		Book Value	Fair Market Value	:
		63588.	42417	15.
Total to Form 990-PF, Part I	II, line 10b	63588.	42417	75.