

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



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

OMB No 1545-0052

		ıva	and allowances	
		b	Less Cost of goods sold	
		C	Gross profit or (loss)	
		11	Other income	
		12	Total. Add lines 1 through	jh 1
		13	Compensation of officers, dire	ector
		14	Other employee salaries	and
		15	Pension plans, employee	ber
	Operating and Administrative Expenses	16a	Legal fees	
	en	þ	Accounting fees	
	Exp	C	Other professional fees	
	Ve Ve	17	Interest	
\approx	rati	18	Taxes	
\approx	nist	19	Depreciation and depletion	on
4	Ē	20	Оссиралсу	
 1	Ą	21	Travel, conferences, and	mee
3	ρug	22	Printing and publications	<u>.</u>
2	ğ	23	Other expenses /	₹Ē
Q	aţi	24	Total operating and adn	aini
哭	þer		expenses. Accines 13	thro
Z	0	25	Contributions, gifts, gran	λέγp
CANNE		26	Total expenses and dist	Jurs
8			Add lines 24 and 25 G) c
		27	Subtract line 26 from lim	-12
		a	Excess of revenue over exper	nses
		h	Not investment income	(if na

		Note. The foundation may be	e able to use a copy of this		ting requirements.	LUII
		dar year 2011 or tax year beginning		, and ending	A F1	
		foundation			A Employer identificatio	n number
		GROSSMAN FAMILY CHARIT	ABLE		04 (75055	,
_		NDATION		<u> </u>	04-6758553	<u> </u>
		d street (or P O box number if mail is not delivered to street	address)		B Telephone number	4504
		JNTINGTON AVENUE		#1301	(617) 859-	-4504
-		wn, state, and ZIP code			C If exemption application is a	pending, check here
		TON, MA 02116			_	
G C	heck	all that apply: Initial return	Initial return of a fo	rmer public charity	D 1. Foreign organization	s, check here
		Final return	Amended return		Foreign organizations m	eeting the 85% test
		Address change	Name change		Foreign organizations m 2. check here and attach c	omputation
H_C	_	type of organization: X Section 501(c)(3) ex			E If private foundation sta	
			Other taxable private founda		under section 507(b)(1)(A), check here
		rket value of all assets at end of year J Accountin		Accrual	F If the foundation is in a	
(fr	om F	Part II, col. (c), line 16)	her (specify)		under section 507(b)(1)(B), check here
▶		2,370,133. (Part I, colui		oasis)		
Pa	<u>rt l</u>	Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not	(a) Revenue and	(b) Net investment	(c) Adjusted net	(d) Disbursements for charitable purposes
		necessarily equal the amounts in column (a))	expenses per books	income	income	(cash basis only)
	1	Contributions, gifts, grants, etc., received			N/A	
	2	Check If the foundation is not required to attach Sch. B			<u> </u>	
	3	Interest on savings and temporary cash investments	26.	26.		STATEMENT 1
	4	Dividends and interest from securities	44,071.	44,071.		STATEMENT 2
	5a	Gross rents	8.	8.		STATEMENT 3
	b	Net rental income or (loss) <166.>				STATEMENT 4
a)	6a	Net gain or (loss) from sale of assets not on line 10	81,156.			
ğ	b	Gross sales price for all assets on line 6a 309,576.				
Revenue	7	Capital gain net income (from Part IV, line 2)		81,156.		
Œ	8	Net short-term capital gain				
	9	Income modifications				<u> </u>
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	C	Gross profit or (loss)			<u> </u>	<u> </u>
	11	Other income	<5,257.		>	STATEMENT 5
	12	Total. Add lines 1 through 11	120,004.	120,004.		
	13	Compensation of officers, directors, trustees, etc	_ 0.	0.		0.
	14	Other employee salaries and wages				<u>-</u>
£ħ.	15	Pension plans, employee benefits				
Se	16a	Legal fees				
рел	b	Accounting fees STMT 6	5,311.	0.		0.
Щ	C	Other professional fees				
i. Ye	17	Interest			_	
Operating and Administrative Expenses	18	Taxes STMT 7	1,617.	0.		0.
ПS	19	Depreciation and depletion				
Ē	20	Оссирапсу				ļ
Ă	21	Travel, conferences, and meetings				
aŭ	22	Printing and publications		40.071		
gu	23	Other expenses RECEIMT 8	42,354.	42,354.		0.
rati	24	. 1601		40 054		_
ğ		expenses. Applines 13 through 23	7 49,282.	42,354.		0.
J	25	Contributions, gifts, grants paid 7	325,460.			325,460.
	26	Total cypylloco alta diobalocilicito:	354 546	40 054	}	205 460
	<u> </u>	Add lines 24 and 28 GDFA	374,742.	42,354.	ļ	325,460.
	I	Subtract line 26 from line 12/1, UT	054 533			
	•	Excess of revenue over expenses and disbursements	<254,738.			
	1	Net investment income (if negative, enter -0-)		77,650.	37/3	
1005		Adjusted net income (if negative, enter -0-)			N/A	Farm 000 DF (004)
1235 12-0	۰، 2-11	LHA For Paperwork Reduction Act Notice, see	instructions.			Form 990-PF (2014)

For	m 99	00-PF (2011) FOUNDATION		<u>04-6</u>	758553 Page 2
Р	art	Balance Sheets Attached schedules and amounts in the description	Beginning of year	End of	
느	art	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing			
	2	Savings and temporary cash investments	428,070.	79,198.	79,198.
	1	Accounts receivable ►			
		Less: allowance for doubtful accounts	1,061.		
			1,001.		
	4	Pledges receivable -	1		
		Less: allowance for doubtful accounts ▶			
	I -	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
		disqualified persons		_	
	7	Other notes and loans receivable			
	`	Less: allowance for doubtful accounts ▶			
"		Inventories for sale or use		-	
Assets	1 -		-		
15S		Prepaid expenses and deferred charges		+	
_	I	Investments - U.S. and state government obligations			
	b	Investments - corporate stock STMT 9	2,198,724.	2,293,919.	<u>2,290,935.</u>
	C	Investments - corporate bonds			
	11	Investments - land, buildings, and equipment basis			
		Less accumulated depreciation			
	12	Investments - mortgage loans			
	13	Investments - other			
	1	-			
	14	Land, buildings, and equipment; basis			
		Less accumulated depreciation			
	15	Other assets (describe			_
	16	Total assets (to be completed by all filers)	2,627,855.	2,373,117.	2,370,133.
	17	Accounts payable and accrued expenses			
	18	Grants payable			
w	19	Deferred revenue			
Liabilities		F			
薑	20	Loans from officers, directors, trustees, and other disqualified persons			
E.	21	Mortgages and other notes payable		***	
	22	Other liabilities (describe)			
			_	_	
	23	Total liabilities (add lines 17 through 22)	0.	0.	
		Foundations that follow SFAS 117, check here			
		and complete lines 24 through 26 and lines 30 and 31.			
ès	24	Unrestricted			
ă	25	Temporarily restricted			
gal	26	Permanently restricted			
ᅙ	-"	Foundations that do not follow SFAS 117, check here			
Ē					
Net Assets or Fund Balances		and complete lines 27 through 31.	2	_	
2	27	Capital stock, trust principal, or current funds	0.	0.	
SSe	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
Ž	29	Retained earnings, accumulated income, endowment, or other funds	2,627,855.	2,373,117.	
Š	30	Total net assets or fund balances	2,627,855.	2,373,117.	
_					
	31	Total liabilities and net assets/fund balances	2,627,855.	2,373,117.	
=					
LP	art	Analysis of Changes in Net Assets or Fund Ba	iiances		
1	Total	net assets or fund balances at beginning of year - Part II, column (a), line 3	an		
•			,,,		2 627 055
_	•	st agree with end-of-year figure reported on prior year's return)		1	2,627,855.
		r amount from Part I, line 27a		2	<u><254,738.</u> >
		r increases not included in line 2 (itemize)		3	0.
4 Add lines 1, 2, and 3 4 2, 373,					
5	Decr	eases not included in line 2 (itemize)		5	<u> </u>
6	Total	net assets or fund balances at end of year (line 4 minus line 5) - Part II, col	lumn (b), line 30	6	2,373,117.
					Form 990-PF (2011)

to SEE ATTACHED	rehouse; or common stock, 2	ld (e.g., real estate, 00 shs. MLC Co.)		`P-Pu	acquired rchase nation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
b SEE ATTACHED							
	STATEMENTS						
<u>c</u>						_	
<u>d</u>					_		
<u>e</u>	45) Degree et en allevent	(n) Coo	t or other beers			(h) Gain or (loss)	
(e) Gross sales price	(f) Depreciation allowed (or allowable)		t or other basis xpense of sale			(e) plus (f) minus (
<u>a</u>						-	
b							
<u>C</u>			<u> </u>				
d e 309,576.			292,66	2.			81,156
Complete only for assets showin	g gain in column (h) and own	ed by the foundation			(1)) Gains (Col. (h) gain	
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Ex	cess of col. (I) col. (J), If any			. (k), but not less that Losses (from col. (1 -0-) or
a							
<u> </u>							
C							
d							
е							81,156
0 11	∫ If gain, also	o enter in Part I, line nter -0- in Part I, line	7	}			81,156
Capital gain net income or (net ca	•		1	1 2			81,130
Net short-term capital gain or (los If gain, also enter in Part I, line 8,		2(5) and (6):		٦			
If (loss), enter -0- in Part I, line 8	oolaliii (o).			} 3		N/A	
Part V Qualification U	nder Section 4940(e) for Reduced	Tax on Net	Invest	ment Inc	ome	•
/as the foundation liable for the sect "Yes," the foundation does not qual Enter the appropriate amount in e	ify under section 4940(e). Do	not complete this pa	rt.		··		Yes X No
(a) Base period years Calendar year (or tax year beginnir	ng in) Adjusted qualifyi		Net value of no	(c) ncharitab	e-use assets		(d) oution ratio ided by col. (c))
2010		309,418.		2,4	03,306	•	10074
2009		251,855.		2,3	83,971	1	.12874
2008							.10564
		259,700.			81,708	•	.10564
2007		296,500.		2,9	81,708 86,134	•	.10564 .03253 .09929
2007 2006				2,9	81,708	•	.12874 .10564! .03253' .099292
2006		296,500.		2,9	81,708 86,134	•	.10564 .03253 .09929 .15862
2006 2 Total of line 1, column (d) 3 Average distribution ratio for the 5		296,500. 309,550.	or by the number	2,9 1,9	81,708 86,134	2	.10564 .03253 .09929 .15862
2006 Total of line 1, column (d)		296,500. 309,550.	or by the number	2,9 1,9	81,708 86,134	•	.10564 .03253 .09929 .15862
2006 Total of line 1, column (d) Average distribution ratio for the 5 the foundation has been in exister	nce if less than 5 years	296,500. 309,550.	or by the number	2,9 1,9	81,708 86,134	2	.10564 .03253 .09929 .15862 .52484
2006 Total of line 1, column (d) Average distribution ratio for the 5 the foundation has been in exister Enter the net value of noncharitab	nce if less than 5 years	296,500. 309,550.	or by the number	2,9 1,9	81,708 86,134	2	.10564 .03253 .09929 .15862 .52484 .10496
2006 Total of line 1, column (d) Average distribution ratio for the state foundation has been in exister. Enter the net value of noncharitab. Multiply line 4 by line 3	nce if less than 5 years ble-use assets for 2011 from P	296,500. 309,550.	or by the number	2,9 1,9	81,708 86,134	2 3	.10564 .03253 .09929 .15862 .52484 .10496 708,660
2006 Protal of line 1, column (d) Average distribution ratio for the street the foundation has been in exister Enter the net value of noncharitab Multiply line 4 by line 3 Enter 1% of net investment incom	nce if less than 5 years ble-use assets for 2011 from P	296,500. 309,550.	or by the number	2,9 1,9	81,708 86,134	2 3 4 5	.10564 .03253 .09929 .15862 .52484 .10496 708,660 74,387
2006 2 Total of line 1, column (d) 3 Average distribution ratio for the 5	nce if less than 5 years ele-use assets for 2011 from P ne (1% of Part I, line 27b)	296,500. 309,550.	or by the number	2,9 1,9	81,708 86,134	2 3 4 5	.10564! .03253 .099292
2006 Total of line 1, column (d) Average distribution ratio for the 5 the foundation has been in exister Enter the net value of noncharitab Multiply line 4 by line 3 Enter 1% of net investment incom Add lines 5 and 6	nce if less than 5 years ble-use assets for 2011 from P ne (1% of Part I, line 27b) n Part XII, line 4	296,500. 309,550. e total on line 2 by 5, Part X, line 5		2,9 1,9	81,708 86,134 51,518	2 3 4 5 6	.10564 .03253 .09929 .15862 .52484 .10496 708,660 74,387 777

THE GROSSMAN FAMILY CHARITABLE FOUNDATION 04-6758553 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. 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 | X | and enter 1% 777. 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-) Add lines 1 and 2 3 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-6 Credits/Payments: 733. 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 733. 7 7 Total credits and payments. Add lines 6a through 6d Enter any penalty for underpayment of estimated tax. Check here _____ if Form 2220 is attached 8 9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed 44. 10 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be: Credited to 2012 estimated tax 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 1a X any political campaign? X 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 X 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 . (2) On foundation managers. ▶ \$ (1) On the foundation. > \$ e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation 0. managers. > \$ 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? X 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 X 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? 4a X b If "Yes." has it filed a tax return on Form 990-T for this year? 4b Х 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? X 7 Did the foundation have at least \$5,000 in assets at any time during the year? X 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)

Form **990-PF** (2011)

X

8b

10

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)

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 addresses

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

of each state as required by General Instruction G? If "No," attach explanation

Part VIII-A Statements Regarding Activities (continued) 11 As a hytme dump the year, dath tenositation, freezity or indescibly, own a controlled entity within the meaning of section 512(b) (13)? if Yes, statich schedule (see instructions) 12 Did the foundation make a distribution is doors advised fund over which the boundation or a disqualified person had advisory privilegies? 12	orm	990-PF (20	11) FOUNDATION	04-6758	553	F	Page 5
section 512(b) (13)? If "exs, attach schedule (see instructions) 10 th the foundation make a distribution to a donor advised fund over which the foundation or a dissignal/find person had advisory privilege?? If "Yes, attach statement (see instructions) 10 th the foundation comply with the public inspection requirements for its annual returns and exemption application? 11 The books are in care of PARABARA N. GROSSMAN 12 The books are in care of PARABARA N. GROSSMAN 15 Section 497(a)(1) nonexempt charitable rusts filing form 1990 Fin like of Form 1041 - Check hare and either the amount of tax-evemption interest received or accrused during the year 16 At any time during calendar year 2011, do the foundation have an interest in or a singular or other authority over a bank, securities, or other financial accrusin a foreign country? 18 At any time during calendar year 2011, do the foundation have an interest in or a singular or other authority over a bank, securities, or other financial accrusin a foreign country? 19 Fart VII-B Statements Regarding Activities for Which Form 4720 May Be Required 19 File Form 4702 if any lethin is checked in the "Vest Column, unless an exception applies. 10 During the year did the foundation (either directly or indirectly): (1) Engage in the sake or exchange, or leasing of property with a dequalified person? 10 File Form 4702 if any lethin is checked in the "Vest Column, unless an exception applies. 10 File Form 4702 in any lethin is checked in the "Vest Column, unless an exception applies. 11 File Form 4702 in any lethin is checked in the "Vest Column, unless an exception applies. 12 File Form 4702 in any lethin is checked in the "Vest Column, unless an exception applies. 13 File Form 4702 in any lethin is checked in the "Vest Column, unless and exception applies. 14 File Form 4702 in any lethin is checked in the "Vest Column, unless and exception applies. 15 File Form 4702 in any lethin is checked in the "Vest Column, unless and exception applies. 16 File Form 4							
12 Did the foundation make a distribution to a disrolation and every brivileges? 13 Did the foundation comply with the public inspection requirements for its annual returns and everription application? 14 The blooks are in care of ▶ BARBARA N. GROSSMAN 15 Every 17 The blooks are in care of ▶ BARBARA N. GROSSMAN 16 Located at ▶ 1 HUNTTINGTON A VENIUE # \$13.01. BOSTON, MA	11	At any time	during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of				
If Yes, attach statement (see instructions) 10 dit folloudation comply with his public dispotion requirements for its annual returns and exemption application? Website address ▶ NONE 11 The books are in care of ▶ BARBARA N. GROSSMAN Located at ▶ HUNT'INGTON AVENUE #1301, BOSTON, MA 279+4 ▶02116 15 Section 4947(a)(1) nonexempt charable trusts filing form 990/PF in lieu of Form 1041 - Check here and enter the amount of tax-eventy interests received or accrued during the year 16 A dary time during calendar year 2011, did the foundation have an interest in or a signalure or other authority over a bank, securities, or forth financial accounting 79 See the instructions for exceptions and filing requirements for Form 10 F 90-22.1. If "Yes," enter the name of the foreign country ▶ 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. File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 Juning the year off the foundation (letter directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualited person? (2) Borrow money from, lend money to, or otherwise exhand credit to (or accept if nom) a disqualited person? (3) Firins for any income or assests to a disqualited person or make any of either available for the benefit or use of a dequalited person or make any of either available for the benefit or use of a dequalited person or make any of either available for the person or assess to a desqualited person or make any of either available for the person or as current notice regarding disaster assistance check the or the benefit or use of a desqualited person or make any of either available for the person or as current notice regarding disaster assistance check here a Did the foundation engage in a prior year in any of the acts described in 16, other than exceptions described in Section 4942(a)(3) or a current notice regard		section 512	(b)(13)? If "Yes," attach schedule (see instructions)		11	_	X
13	12	Did the four	ndation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory	privileges?			
Webste address ► NONE If he books are in case of ► BARBARA N. GROSSMAN Located at ► 1 HUNTINGTON AVENUE #1301, BOSTON, MA 2(IP-4 ► 02116 15 Section 4947(a)(1) encewarpt charitable trusts flwing form 990PF in like of Form 1041-Check here and enter the maximum charitable trusts flwing form 990PF in like of Form 1041-Check here and enter the maximum charitable trusts flwing form 990PF in like of Form 1041-Check here and enter the maximum charitable trusts flwing form 990PF in like of Form 1041-Check here and enter the maximum charitable trusts flwing form 990PF in like of Form 1041-Check here and enter the maximum charitable trusts flwing form 990PF in like of Form 1041-Check here and enter the maximum charitable flwing		If "Yes," atta	ch statement (see instructions)		12		<u> </u>
14. The books are in care of ▶ BARBARA N. GROSMAN Located at ▶ 1 HUNTINGTON AVENUE #1301, BOSTON, MA 15. Section 49/7(a)(1) nonexempt chariable trusts fining form 980-Pe in lieu of form 1041. Check here and enter the amount of tax-exempt interest received or accrued during the year 16. At any time during calendar year 2011, dud the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? 16. At any time during calendar year 2011, dud the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? 17. Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required 18. File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19. Dentity Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required 19. Sport when the sale or exchange, or leasing of property with a disqualified person? 10. Sport when the sale or exchange, or leasing of property with a disqualified person? 11. Singape in the sale or exchange, or leasing of property with a disqualified person? 12. Sport when the sale or exchange, or leasing of property with a disqualified person? 13. Furnish goods, services, or facilities to (or accept it from) a disqualified person? 14. Pay compensation to, or pay or reminiburise the expenses of, a disqualified person? 15. Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? 16. 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 termanation of government period person (or make any of either available for pay money or property to a government grow of the acts selection for period after termanation of government period person (or make any of either sevent person and official per	13	Did the four	ndation comply with the public inspection requirements for its annual returns and exemption application?	Į	13	Х	
Located at N=1 HUNTINGTON AVENUE #1301 BOSTON, MA ZIP-4 02116 Section 4947(a)(1) nonexempt charactable trusts filting Form 930-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year 16. At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial cacount in a foreign country? See the instructions for exceptions and filting requirements for Form 10 F 90-22.1. If Yes, onter the name of the foreign country? Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any term is checked in the Yes* column, unless an exception applies. 1a During the year did the foundation (either directly or indirectly); (1) Engage in the sale or exchange, or lessing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept if from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or remibures the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person or district termination of government service, if terminating within 90 days,) b) if any answer is Yes* to fa(1)-(6), did any of the acts fat for qualify under the exceptions described in Regulations section 53-49 (1)-30 in an current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see mistructions)? Organizations relying on a current notice regarding disaster assistance (see mistructions)? Organizations relying on a current notice regarding disaster assistance (see mistructions)? If Yes is the end of tax year 2011, did the foundation have any undistributed encome (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If Yes, is the year's undistributed encome (ethation disaster assis							
15. Section 4947(a)(1) nonexempt charatable trusts filing Form 990.PE in lieu of Form 1041 - Check here and enter the amount of the xecempt interest recognition tips year 16. At any time during calendar year 2011, did the toundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and fining requirements for Form 10 F 90-22.1. If "Yes," enter the name of the foreign country 2	14					04	
and enter the amount of tax-exempt interest received or accrued during the year 6 At any time during calendar year 2011, dot the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and thing requirements for Form TD F 90-221. If "Yes," enter the name of the foreign country 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. 1a During the year did the foundation (either directly or indirectly) or indirectly or in				ZIP+4 ▶<u>02</u>	<u> 116</u>		
Name	15					▶	
Securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If Yes, enter the name of the foreign country 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. 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? (2) Borrow money from, lead money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburss the expenses of, a disqualified person? (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)? (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.) b If any answer is Yes's to 1a(1)-(6), did any of the acts fall to qualify under the exceptions described in Regulations sections 34,941-(6)-3 or in a current notice regarding disaster assistance (see instructions)? 7 Taxis on failure to distribute imcome (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942-(3)(3) or 4942/(3)(5)): 8 Aft the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? 1a 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 before 2011? 1b 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 as		and enter th	ne amount of tax-exempt interest received or accrued during the year	15			
See the mistructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country 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. 1a During the year did the foundation (either drectly or indirectly): (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) a disqualified person? (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 for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of the acts fait to qualify under the exceptions described in Regulations section 53.4941(0).3 or in a current notice regarding disaster assistance check here 6. 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 Deginning in 2011. 7 Exa Son dialize to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(i)(3) or 4942(i)(5)): 8 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	16	-		1	را ا	res	
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a During the year did the foundation (either dreetly or indirectly): (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) a disqualified person? (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 for the benefit or use of a disqualified person) or make any of either available for the benefit or use of a disqualified person) or make any of either available for the benefit or use of a disqualified person) or make any of either available for the benefit or use of a disqualified person) or make any of either available for the benefit or use of a disqualified person) or make any of either available for the benefit or use of a disqualified person) or make any of either available for the benefit or use of a disqualified person) or make any of either available for the benefit or use of a disqualified person) or the exceptions described in Regulations assection 53.491(0.3) or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? In Yes a No It is a sea on failure to distribute income (section 4942 (ose not apply for years the foundation was a private operating foundation defined in section 4942(1)(3) or 4942(1)(5); or any assistance (see instructions)? A It the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If			·	}	16		<u>X</u>
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1 a During the year did the foundation (either directly): (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) a disqualified person? (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) Transler any income or assets to a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of the acceptance of the available for the benefit or use of a disqualified person or make any of the acceptance of the available for the available for the benefit or use of a disqualified person or make any of the acceptance of the available for th							
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): (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) a disqualified person? (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 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 argue to make a grant to or to employ the official for a period after 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)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? 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(in) or 4942(in)(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 before 2011? If "Yes, its 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	Da	country	Statements Degarding Activities for Which Form 4700 May Be Deguired				
1a During the year did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualited person? Yes X No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? Yes X No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes X 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) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (e) (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.) b If any answer is "Yes to 1a(1)-(6), did any of the acts tail to qualify under the exceptions described in Regulations section 33.491(d)-3 or in a current notice regarding disaster assistance (see instructions)? N/A 1b 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(a)(3) or 4942(b)(3)	Га			1		/ 00	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) a disqualified person? (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 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 grain to or to employ the official for a period after termination of government service, if terminating within 90 days.) b If any answer is "Yes" to 1q(1)-(6), did any of the acts fall to qualify under the exceptions described in Regulations section 53-491(d)-30 in a current notice regarding disaster assistance (see instructions)? 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 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(j)(3) or 4942(j)(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 before 2011? If "Yes," list the years sundistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) In the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. A Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? In the provisions of section 4943(c)(7) to dispose of holdings acquired by grift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding per	4.		•	ŀ	-	65	140
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (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 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 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)? 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 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(j)(3) or 4942(j)(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 before 2011? If "Yes," list the years Islated in 2a for which the foundation is not applying section 4942(a)(2) feating 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.) 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 depose of holdings acquired by grift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first	ıa			/oo V No			
a disqualified person?		• •		68 (22) 140			
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?				es X No			
(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 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 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)? Organizations relying on a current notice regarding disaster assistance check here 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 2011? 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 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 statement - see instructions.) 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 brake holding period? (Use Schedule C, Form 4720, to determine if the fou			' ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' '				
(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)? (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.) 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)? Crganizations relying on a current notice regarding disaster assistance (see instructions)? Crganizations relying on a current notice regarding disaster assistance (see instructions)? Crganizations relying on a current notice regarding disaster assistance (see instructions)? Crganizations relying on a current notice regarding disaster assistance (see instructions)? Crganizations relying on a current notice regarding disaster assistance (see instructions)? N/A 1b Crganizations relying on a current notice regarding disaster assistance (see instructions)? N/A 1b Crganizations relying on a current notice regarding disaster assistance (see instructions)? N/A 1c Tres on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(i)(3) or 4942(i)(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 before 2011? If "Yes," list the years Yes No If "Yes," list the years Yes No If "Yes," list the years is 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 sundistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) If the provisions of section 4942(a)(2) are being applied to							
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 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)? 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 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(i)(3) or 4942(i)(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 before 2011? If 'Yes,' list the years Is 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.) 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, Form 4720, to determine if the foundation had excess business holdings in 2011.) N/A a Did the foundation make any investment in a prior year (but after December 31, 1969) that could pepardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011?							
(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.) 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)? 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 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(j)(3) or 4942(j)(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 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 statement - see instructions.) 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, Form 4720, to determine if the foundation had excess business holdings in 2011.) 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 2011?				es X No		1	
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)? 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 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(i)(3) or 4942(i)(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 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 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. 1		(6) Agree t	to pay money or property to a government official? (Exception. Check "No"		1		
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)? Organizations relying on a current notice regarding disaster assistance check here 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 2011? 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)): 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 before 2011? If Yes," list the years 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.) If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? 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, Form 4720, to determine if the foundation had excess business holdings in 2011.) A 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		ıf the fo					
section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? 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 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(j)(3) or 4942(j)(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 before 2011? If 'Yes,' list the years \		termina	ation of government service, if terminating within 90 days.)	es X No			
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 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(i)(3) or 4942(i)(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 before 2011? If "Yes," list the years Islated 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.) If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Did the foundation fold more than a 2% direct or indirect interest in any business 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 2011.) N/A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011?	b	If any answ	er is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations	.			
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 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(j)(3) or 4942(j)(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 before 2011? If "Yes," list the years \			• • • • • • • • • • • • • • • • • • • •	N/A	1b		
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(j)(3) or 4942(j)(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 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 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. 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? 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, Form 4720, to determine if the foundation had excess business holdings in 2011.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 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 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(j)(3) or 4942(j)(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 before 2011? If 'Yes,'' list the years If 'Yes,'' list the years If 'Yes,'' list the year's undistributed income? (If 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.) If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 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, Form 4720, to determine if the foundation had excess business holdings in 2011.) A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purpose? In At a 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 2011?	C				.		37
defined in section 4942(j)(3) or 4942(j)(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 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 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. D	•			}	1C		<u> </u>
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 before 2011? If "Yes," list the years Yes X No No Yes X No Yes	2			ł			
before 2011? If "Yes," list the years \	•			na			
If "Yes," list the years ,,	•						
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? 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, Form 4720, to determine if the foundation had excess business holdings in 2011.) 10 A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 10 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 2011?							
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.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	b			et l			
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.				i i	- 1		
Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Yes X No		statement -	see instructions.)	N/A	2b		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? 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, Form 4720, to determine if the foundation had excess business holdings in 2011.) 13b 14a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 15b 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 2011? 16c X No 17c X No 18c	C	If the provis	sions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	Ī			
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? 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, Form 4720, to determine if the foundation had excess business holdings in 2011.) 13b 14a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 15b 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 2011? 16c X No 17c X No 18c		>	, <u> </u>		1		
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, Form 4720, to determine if the foundation had excess business holdings in 2011.) N/A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 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 2011? X	3a	Did the four	ndation hold more than a 2% direct or indirect interest in any business enterprise at any time		1		
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 2011.) N/A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 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 2011? 4b X		during the y	/ear?	es X No			
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 2011.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b 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 2011? 4b X	b		• • • • • • • • • • • • • • • • • • • •				
Form 4720, to determine if the foundation had excess business holdings in 2011.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b 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 2011? 4b X		-	···				
4aDid the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?4aXb 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 2011?4bX		_			_		
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 2011? 4b X				N/A		_	7,
had not been removed from jeopardy before the first day of the tax year beginning in 2011? 4b X				la that	4a		<u> </u>
	b			e mat	4.		v
		HAU HOLDE	stremoved nom jeopardy perote the litst day of the tax year beginning in 2011.	Form		PF "	

Form 990-PF (2011) FOUNDATION			04-67585	<u>53</u>	Page 6
Part VII-B Statements Regarding Activities for Which F	Form 4720 May Be F	Required (contin	ued)		
5a During the year did the foundation pay or incur any amount to:					
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	1 4945(e))?	Ye	es 🗶 No		
(2) Influence the outcome of any specific public election (see section 4955); o	r to carry on, directly or indire	ectly,			
any voter registration drive?			es 🗶 No		
(3) Provide a grant to an individual for travel, study, or other similar purposes'	7	Ye	es 🗶 No	İ	
(4) Provide a grant to an organization other than a charitable, etc., organization	n described in section				
509(a)(1), (2), or (3), or section 4940(d)(2)?		Ye	es X No		
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or f	or			
the prevention of cruelty to children or animals?		Ye	es 🗶 No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und	der the exceptions described i	n Regulations		İ	
section 53.4945 or in a current notice regarding disaster assistance (see instru	ctions)?		N/A	5b	1
Organizations relying on a current notice regarding disaster assistance check h	ere				
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fr	om the tax because it mainta	ined		ļ	
expenditure responsibility for the grant?	N	I/A 🔲 Ye	es 🔲 No	1	
If "Yes," attach the statement required by Regulations section 53 4945	5-5(d)				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	pay premiums on				
a personal benefit contract?		Y6	es X No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	ersonal 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 s	helter transaction?	Ye	es X No		
b If "Yes," did the foundation receive any proceeds or have any net income attribu	table to the transaction?		N/A	7b	
Information About Officers, Directors, Trusto		nagers, Highly	У		
Paid Employees, and Contractors					
1 List all officers, directors, trustees, foundation managers and their		1	(4)		
(a) Name and address	(b) Title, and average hours per week devoted	(c) Compensation (If not paid,	(d) Contributions to employee benefit plans and deferred	(e)	Expense ount, other
, ,	to position	`enter -0-)'	compensation	allo	owances
	DIRECTOR				
1 HUNTINGTON AVENUE, #1301	40.00		_		_
BOSTON, MA 02116	10.00	0.	0.		0.
					
2 Compensation of five highest-paid employees (other than those inc	luded on line 1) If none	enter "NONE "	<u> </u>	L	
2 Compensation of the manage para employees (early than the management	(b) Title, and average		(d) Contributions to	(e)	Expense
(a) Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	employee benefit plans and deferred	acco	ount, other owances
NONE	devoted to position		compensation	and	JWances
NONE					
					
		1			
Total number of other employees paid over \$50,000					0

Form **990-PF** (2011)

Form 990-PF (2011) FOUNDATION	04-	6758553 Page 7
Part VIII Information About Officers, Directors, Trustees, Formation About Officers, Directors, (continued)	oundation Managers, Highly	
3 Five highest-paid independent contractors for professional services. If non	e, enter "NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
_		
* ***		
T 1 1		D 0
Total number of others receiving over \$50,000 for professional services Part IX-A Summary of Direct Charitable Activities		<u>▶</u> 0
List the foundation's four largest direct charitable activities during the tax year. Include relevan		Expenses
number of organizations and other beneficiaries served, conferences convened, research page 27.42	Ders produced, etc.	
1 <u>N/A</u>		
	· · · <u> </u>	
2		
3		
4		•
D IN BIO		
Part IX-B Summary of Program-Related Investments		A
Describe the two largest program-related investments made by the foundation during the tax	year on lines 1 and 2.	Amount
1 <u>N/A</u>		
2		7
·		
All other program-related investments. See instructions.		
3		
Total. Add lines 1 through 3		0.
		Form 990-PF (2011)

12356

04-6758553 Page 8 FOUNDATION Form 990-PF (2011) Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.) Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: 463,950. a Average monthly fair market value of securities 1a 255,502. 1b Average of monthly cash balances c Fair market value of all other assets 1c 719,452. 1d d Total (add lines 1a, b, and c) Reduction claimed for blockage or other factors reported on lines 1a and 0. 1c (attach detailed explanation) 1e Acquisition indebtedness applicable to line 1 assets 719,452. 3 3 Subtract line 2 from line 1d 10,792. Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) 4 708,660. Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 5 35,433. Minimum investment return Enter 5% of line 5 Distributable Amount (see instructions) (Section 4942(i)(3) and (i)(5) private operating foundations and certain Part XI foreign organizations check here

and do not complete this part.) 35,433. Minimum investment return from Part X, line 6 777 2a Tax on investment income for 2011 from Part VI, line 5 889. 2b Income tax for 2011. (This does not include the tax from Part VI.) .666. Add lines 2a and 2b 33.767. 3 Distributable amount before adjustments. Subtract line 2c from line 1 Recoveries of amounts treated as qualifying distributions 767. 5 Add lines 3 and 4 Deduction from distributable amount (see instructions) 6 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 767. Part XII Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: 1 325,460. Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 1a Program-related investments - total from Part IX-B 1b 2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes Amounts set aside for specific charitable projects that satisfy the: a Suitability test (prior IRS approval required) 3a Cash distribution test (attach the required schedule) 3b 325,460. Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment

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

Form **990-PF** (2011)

income. Enter 1% of Part I, line 27b

Adjusted qualifying distributions Subtract line 5 from line 4

4940(e) reduction of tax in those years.

Page 9

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI,				
line 7				33,767.
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only		-	0.	
b Total for prior years:				
		0.		
3 Excess distributions carryover, if any, to 2011:				
a From 2006 225,814. b From 2007 159,039.	•			
b From 2007 c From 2008				
d From 2009 133,662.				
e From 2010 189,867.				
f Total of lines 3a through e	708,382.			
4 Qualifying distributions for 2011 from	700,3021			· · · · · · · · · · · · · · · · · · ·
Part XII, line 4: ► \$ 325, 460.				
a Applied to 2010, 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 2011 distributable amount				33,767.
e Remaining amount distributed out of corpus	291,693.			
Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	1,000,075.			
b Prior years' undistributed income. Subtract	2/000/0101			
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				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 2006	225 214			
not applied on line 5 or line 7	225,814.	<u>-</u>		
9 Excess distributions carryover to 2012.	774,261.			
Subtract lines 7 and 8 from line 6a	1/4,201.			
10 Analysis of line 9: a Excess from 2007 159,039.				
b Excess from 2008				
c Excess from 2009 133,662.				
d Excess from 2010 189,867.				
e Excess from 2011 291,693.				
			· · · · · · · · · · · · · · · · · · ·	5 000 DE (0044)

Part XIV Private Operating F		structions and Part VI	-A. guestion 9)	N/A	4-0730333			
1 a If the foundation has received a ruling o				14/11				
-								
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(j)(3) or 4942(j)(5)								
2 a Enter the lesser of the adjusted net	Tax year	g toditation acsorbed	Prior 3 years		1342()(0)			
income from Part I or the minimum	(a) 2011	(b) 2010	(c) 2009	(d) 2008	B (e) Total			
investment return from Part X for	(4)	(-/	(-,	(-,	(,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,			
each year listed b 85% of line 2a								
•		·- · ·						
 Qualifying distributions from Part XII, line 4 for each year listed 								
d Amounts included in line 2c not					-			
used directly for active conduct of			ļ	:				
exempt activities			Ì					
e Qualifying distributions made directly								
for active conduct of exempt activities.								
Subtract line 2d from line 2c								
3 Complete 3a, b, or c for the								
alternative test relied upon:								
a "Assets" alternative test - enter:(1) Value of all assets								
(2) Value of assets qualifying								
under section 4942(j)(3)(B)(i) b "Endowment" alternative test - enter								
2/3 of minimum investment return shown in Part X, line 6 for each year listed								
c "Support" alternative test - enter:								
(1) Total support other than gross								
investment income (interest,								
dividends, rents, payments on securities loans (section								
512(a)(5)), or royalties)								
(2) Support from general public					, and the second			
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			<u> </u>					
Part XV Supplementary Info			if the founda	ation had \$5,000	or more in assets			
at any time during t		uctions.)						
1 Information Regarding Foundation	-							
a List any managers of the foundation wh year (but only if they have contributed in			ributions received	by the foundation befor	e the close of any tax			
BARBARA N. GROSSMAN								
b List any managers of the foundation wh other entity) of which the foundation ha			(or an equally large	e portion of the ownersh	nip of a partnership or			
NONE								
2 Information Regarding Contribut	ion. Grant. Gift. Loan.	Scholarship, etc., P	ograms:					
Check here X if the foundation of the foundation makes gifts, grants, etc.	only makes contributions	to preselected charitable	organizations and					
a The name, address, and telephone num	·	<u> </u>		ons, complete tems za,	, 0, 0, and 0.			
a The hame, address, and telephone hum	ber of the person to who	n applications should be	audi 63560.					
b The form in which applications should be	pe submitted and informa	tion and materials they s	hould include:					
c Any submission deadlines:			·					
			former of the state of					
d Any restrictions or limitations on award	s, such as by geographica	u areas, charitable fields.	KINOS OT INSTITUTION	ns, or other factors:				

Form 990-PF (2011)

FOUNDATION

04-6758553 Page 11

3 Grants and Contributions Paid During the Ye		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)	any foundation manager or substantial contributor	recipient		
a Paid during the year				
ACHIEVEMENT CENTERS FOR CHILDREN AND FAMILIES 555 NW 4TH STREET	NONE	501C3	CHARITABLE PURPOSE	
DELRAY BEACH, FL 33444				1,00
BOSTON SYMPHONY ORCHESTRA 301 MASSACHUSETTS AVENUE SYMPHONY HALL BOSTON, MA 02115	NONE	501C3	CHARITABLE PURPOSE	3,00
CASTLE PRESERVATION SOCIETY 455 OLD MOUNTAIN ROAD MOULTONBOROUGH, NH 03254	NONE	501C3	CHARITABLE PURPOSE	50
CENTER FOR REPRODUCTIVE RIGHTS 120 WALL STREET NEW YORK, NY 10005	NONE	501C3	CHARITABLE PURPOSE	150,00
CYSTIC FIBROSIS FOUNDATION 220 NORTH MAIN STREET, SUITE 104 NATICK, MA 01760	NONE	501C3	CHARITABLE PURPOSE	50
	TINUATION SHEE	T(S)	▶ 3a	325 46
b Approved for future payment NONE				
				_
<u>Total</u>			▶ 3b	

Form 990-PF (2011) FOUNDATION

ĺ	Part XVI-A	Analysis of Income-Producing Activities
	Fait Avi-A	Allalysis of income-i roducing Activities

Fater areas and and an alternation	Unrelated	business income	Excluded b	y section 512, 513, or 514	(a)
Enter gross amounts unless otherwise indicated.	(a) Business	(b) Amount	(C) Exclu- sion	(d) Amount	(e) Related or exempt function income
1 Program service revenue:	code		code	Amount	
a	-	· · - · - · · - · ·	+ +-		
b	-		+ +-		
c	-				
d	-				
e	-		+ +-		
f	-		 -		
g Fees and contracts from government agencies		<u> </u>	+ +		
2 Membership dues and assessments	-				
3 Interest on savings and temporary cash			1 4	20	
investments			14	26.	2 000
4 Dividends and interest from securities			14	41,049.	3,022.
5 Net rental income or (loss) from real estate:			0.1	1.00	
a Debt-financed property		<u>-</u>	01	<166.	>
b Not debt-financed property					
6 Net rental income or (loss) from personal					
property			0.1	5 0.60	
7 Other investment income			01	<5,262.	> 5.
8 Gain or (loss) from sales of assets other					
than inventory			18	81,156.	<u></u>
9 Net income or (loss) from special events			+		
10 Gross profit or (loss) from sales of inventory			1		
11 Other revenue:					
a	_				• • •
b	-		+ +		
C	-				
d	-				
e	-		+	446 000	2 225
12 Subtotal. Add columns (b), (d), and (e)		0	•	116,803.	
13 Total. Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.)				13	119,830.
Part XVI-B Relationship of Activities Line No. Explain below how each activity for which include the foundation's exempt purposes (other than the foundation's exempt purposes).	come is reported in	column (e) of Part XVI-			nplishment of
7 TAX EXEMPT INTEREST F	ROM INVES	TMENTS.			
					_
					
				<u> </u>	
				<u> </u>	
					·

Form **990-PF** (2011)

Form 990		(11) FOUND Information Re		efere To a	and Tr	ansactions a	and Rela	tionsh		6758553		ge 13
1 01 0		Exempt Organ		3,013 10 0	411G 11		aa		iipo iiiiii iio			
1 Did	the org	janization directly or indi	_	of the followin	g with ar	ny other organization	on described	ın sectio	n 501(c) of		Yes	No
the	Code (other than section 501(c))(3) organizations) or	r in section 52	7, relatır	ig to political organ	nizations?					
a Tra	nsfers f	rom the reporting founda	ation to a noncharitat	ble exempt org	ganızatıo	n of:						
(1)	Cash									<u>1a(1)</u>		<u>X</u>
	Other									1a(2)		<u>X</u>
		sactions:										7,
		of assets to a noncharita								1b(1)		X
٠,		ases of assets from a no		rganization						1b(2)		X
		of facilities, equipment,								1b(3) 1b(4)		X
		oursement arrangements or loan guarantees								1b(4)		X
		mance of services or me	embership or fundrais	sına solıcıtatıo	ns					1b(6)		X
٠,		facilities, equipment, ma	·	-						1c		X
	-	er to any of the above is				lumn (b) should alv	ways show tl	he fair ma	arket value of the	goods, other ass	ets,	
or :	services	given by the reporting for	oundation. If the four	ndation receive	ed less tl	nan fair market valu	ue in any trar	saction (or sharing arrange	ement, show in		
col		the value of the goods,										
(a) Line n	0 1	(b) Amount involved (c) Name of noncharitable			exempt	organization	(d) De	(d) Description of transfers, transact			angeme	nts
		<u> </u>	_	N/A		·	 			= -		
	-											
	-											
	-	<u> </u>				· ·						
												
	-			 -								
								•				
			<u></u>									
									<u> </u>			
			<u></u>			.						
		idation directly or indirec	-				izations desc	ribeo		□ Vaa	v	ا ا
		501(c) of the Code (othe implete the following sch		(3)) OF III SECT	11011 327	•				Yes		∐ No
יי ע	163, 60	(a) Name of org			(b) Typ	oe of organization		((c) Description of re	elationship		
		N/A			,,,,,			•	· ·			
		,										
	_						<u> </u>					
		penalties of perjury, I declare lief, it is true, correct, and cor								May the IRS of return with the	discuss t	this
Sign		belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer is								shown below	(see ins	tr)?
Here	Cunn							RECT	OR	LX Yes		J No
	Sign	ature of officer or trustee Print/Type preparer's na		Preparer's s		ate	Title Date	- 	Check If	PTIN		
		r miv rype preparer S N	anne	Trieparer 5 5	igiiatuie		Date		self- employed	' ' '''		
Paid		STEVEN P.	RODMAN	STEVEN	T D	RODMAN	10/30			P00090	902	
Prep	arer	Firm's name ► ROD				TODIAN.		<u>, </u>	Firm's EIN ▶ 0			
Use		1		, _					· · · · · · · · · · · · · · · · · · ·			
	- :	Firm's address ▶ 3	NEWTON EX	ECUTIV	E PA	ARK	- -					

123622 12-02-11 NEWTON, MA 02462-1433

Phone no.

(617) 965-5959 Form **990-PF** (2011)

Part XV **Supplementary Information** Grants and Contributions Paid During the Year (Continuation) Recipient If recipient is an individual, Foundation Purpose of grant or show any relationship to status of recipient Amount contribution any foundation manager Name and address (home or business) or substantial contributor CHARITABLE PURPOSE MASSACHUSETTS NOW FOUNDATION NONE 501C3 P.O. BOX 51081 150. BOSTON, MA 02205 NONE 501C3 CHARITABLE PURPOSE MILL REEF FUND 140 BROADWAY, 4TH FLOOR 100. NEW YORK, NY 10005 501C3 MILTON ACADEMY NONE CHARITABLE PURPOSE 170 CENTRE STREET 25,000, MILTON, MA 02186 NONE 501C3 CHARITABLE PURPOSE MUSEUM OF FINE ARTS 465 HUNTINGTON AVENUE 6,000. BOSTON, MA 02115 NATIONAL COUNCIL FOR JEWISH WOMEN NONE 501C3 CHARITABLE PURPOSE 53 WEST 23RD, 6TH FLOOR 6,700. NEW YORK NY 10010 501C3 PAN MASS CHALLENGE NONE CHARITABLE PURPOSE 77 FOURTH AVENUE 100. NEEDHAM, MA 02494 PLANNED PARENTHOOD OF METROPOLITAN NONE 501C3 CHARITABLE PURPOSE WASHINGTON 1108 16TH STREET, NW 5,750, WASHINGTON, DC 20036 PRO CHOICE MASS FOUNDAION NONE 501C3 CHARITABLE PURPOSE 15 COURT SQUARE, SUITE 990 200. BOSTON, MA 02108 SANDWICH CHILDREN'S CENTER NONE 501C3 CHARITABLE PURPOSE 54 MAPLE STREET 500. SANDWICH, NH 03227 NONE 501C3 CHARITABLE PURPOSE SQUAM LAKES CONSERVATION SOCIETY PO BOX 696 65,700. HOLDERNESS, NH 03245 Total from continuation sheets 170 460.

04-6758553

Part XV **Supplementary Information** Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, show any relationship to any foundation manager Recipient Foundation Purpose of grant or Amount status of contribution Name and address (home or business) recipient or substantial contributor THE CENTER FOR POLICY ANALYSIS NONE 501C3 CHARITABLE PURPOSE PO BOX 29586 60. SAN FRANCISCO, CA 94129 501C3 CHARITABLE PURPOSE THE PREPATORY FOUNDATION NONE 1286 HYDE PARK AVENUE HYDE PARK, MA 02136 6,000, THE SQUAM LAKES ASSOCIATION NONE 501C3 CHARITABLE PURPOSE PO BOX 204 HOLDERNESS NH 03245 3,000. 501C3 UNITED SOUTH END SETTLEMENTS, CAMP NONE CHARITABLE PURPOSE HALE 566 COLUMBUS AVENUE BOSTON, MA 02118 600. UNIVERSITY OF PENNSYLVANIA NONE 501C3 CHARITABLE PURPOSE 433 FRANKLIN BUILDING PHILADELPHIA, PA 19104 50,000. 501C3 SHEHEROE NONE CHARITABLE PURPOSE 1112 MONTANA AVE #856 100. SANTA MONICA, CA 90403 ROGERSON COMMUNITIES NONE 501C3 CHARITABLE PURPOSE ONE FLORENCE STREET 500, BOSTON, MA 02131 Total from continuation sheets

Capital Gains and Los	sses for Tax on Investment income				,	
(a) List and 2-story br	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)			
1a 24752.475 VANG		P	09/07/10	09/07/11		
b ST GAIN FROM K	T.P	P	00,0.,20	00,0.,22		
		<u>L OPPORTUNITIES I</u> L OPPORTUNITIES I	-	P		
		GN MANAGERS LP		P		
e LT GAIN FROM K				P		
	-1 GRESHAM HEDGE			P		
			+	P	-	
g LT GAIN FROM K			T D			
h ST LOSS FROM K			-	<u> P</u>	 	<u> </u>
LT LOSS FROM K	-1 GRESHAM SELEC	T ASSET MANAGERS	LP	P	 	
_ LT CAP						
k CAPITAL GAINS	DIVIDENDS			_		
<u>m</u>						
n					_	
0					<u> </u>	
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale) Gain or (loss) plus (f) minus (g)	
a 299,965.		292,662.				7,303.
b	-					22,698.
С						16,333.
d						<2,469.>
е						18,484.
f		_				2,401.
g						7,772.
h						<391.>
<u>"</u>						<586.>
'						0.
k 9,611.				· · ·	•	9,611.
<u>k</u> 9,611.						<i>J</i> ,011.
	10. 0					
<u>m</u>						
<u>n</u>						
Complete only for accets chown	ng gain in column (h) and owned by	the foundation on 12/31/69		(1) 1 0	none (fram oal (b))	
Complete only for assets shown	<u> </u>	· · · · · · · · · · · · · · · · · · ·			sses (from col. (h)) of col. (h) gain ovei	
(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			not less than "-0-")	00 (N),
	43 01 12/0 1/00	5101 501. (j), 11 ally				7 202
<u>a</u>						7,303.
<u>b</u>					·	22,698.
<u>c</u>						16,333.
<u>d</u>	<u> </u>					<u><2,469.</u> >
<u>e</u>		ļ				18,484.
<u>f</u>						2,401.
<u>g</u>						7,772.
<u>h</u>						<u><391.</u> >
<u> </u>						<u> </u>
J						0.
k	_					9,611.
I						
m						
n						
0						
	16	Down Line 7				
2 Capital gain net income or (net ca	apital loss) { If gain, also enter -(r in Part I, line 7)-" in Part I, line 7	2			81,156.
	ss) as defined in sections 1222(5) ar	5				
3 Net short-term capital gain or (lost figain, also enter in Part I, line 8,		\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \				
If (loss), enter "-0-" in Part I, line			3		N/A_	<u></u>

FORM 990-PF INTEREST ON SAVINGS A	ND TEMPORARY CA	ASH INVESTMENTS	STATEMENT	1
SOURCE			AMOUNT	
NATIONAL FINANCIAL SERVICES LLC				26.
TOTAL TO FORM 990-PF, PART I, LINE	3, COLUMN A			26.
FORM 990-PF DIVIDENDS AND	INTEREST FROM	SECURITIES	STATEMENT	2
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A	.)
GRESHAM FOREIGN MANAGERS LP GRESHAM GLOBAL OPPORTUNITIES, LP GRESHAM HEDGED STRATEGIES QP, LP	14,326. 4,283. <3.3	0. 0. > <3.>	14,3 4,2	
GRESHAM HEDGED STRATEGIES QP, LP GRESHAM SELECT ASSET MANAGERS LP NATIONAL FINANCIAL SERVICES	3,022. 10,516. 11,924.	0. 0. 0.	3,0 10,5 11,9	22. 16.
NATIONAL FINANCIAL SERVICES	9,614.	9,614.	11,3	0.
TOTAL TO FM 990-PF, PART I, LN 4	53,682.	9,611.	44,0	71.
FORM 990-PF REN	TAL INCOME		STATEMENT	3
KIND AND LOCATION OF PROPERTY	-	ACTIVITY NUMBER	GROSS RENTAL INC	OME
GRESHAM FOREIGN MANAGERS LP GRESHAM HEDGED STRATEGIES LP GRESHAM SELECT ASSET MANAGERS LP		1 2 3		8.
TOTAL TO FORM 990-PF, PART I, LINE	5A			8.

FORM 990-PF RENT	TAL EXI	PENSES		STATEMENT	4
DESCRIPTION	1	ACTIVITY NUMBER	AMOUNT	TOTAL	
GRESHAM FOREIGN MANAGERS LP - SUBTOS GRESHAM HEDGED STRATEGIES LP		1	159. 15.		59.
- SUBTO	TAL -	2			15.
TOTAL RENTAL EXPENSES			:	1	74.
NET RENTAL INCOME TO FORM 990-PF,	PART :	I, LINE 5B		<1	66.
FORM 990-PF (OTHER :	INCOME		STATEMENT	5
DESCRIPTION		(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME		
GRESHAM HEDGED STRATEGIES LP GRESHAM SELECT ASSET MANAGERS LP GRESHAM FOREIGN ASSET MANAGERS GRESHAM HEDGED STRATEGIES LP GRESHAM SELECT ASSET MANAGERS LP GRESHAM GLOBAL OPPORTUNITIES GRESHAM FOREIGN ASSET MANAGERS GRESHAM HEDGED STRATEGIES LP GRESHAM SELECT ASSET MANAGERS LP GRESHAM HEDGED STRATEGIES QP, LP NATIONAL FINANCIAL SERVICES LLC TOTAL TO FORM 990-PF, PART I, LINE	E 11	10 <1,125 <429 <76 490 <1,036 554 <3,656	<pre>.> <76 . 490 .> <1,036 . 554</pre>	> .> .>>	
FORM 990-PF AC	CCOUNT	ING FEES		STATEMENT	6
EXPI	(A) ENSES BOOKS	(B) NET INVEST MENT INCOM			
ACCOUNTING FEES	5,311	•	0.		0.
TO FORM 990-PF, PG 1, LN 16B	5,311		0.	=	0.

FORM 990-PF	TAX	ES	STATEMENT 7		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME		(D) CHARITABLE PURPOSES	
MASSACHUSETTS FORM PC	35.	0.		0.	
FOREIGN TAXES FROM GRESHAM GLOBAL OPPORTUNITIES	445.	0.		0.	
FOREIGN TAXES FROM GRESHAM FOREIGN MANAGERS	917.	0.		0.	
FOREIGN TAXES FROM GRESHAM HEDGED STRATEGIES	33.	0.		0.	
FOREIGN TAXES FROM GRESHAM SELECT ASSET MANAGERS	187.	0.		0.	
TO FORM 990-PF, PG 1, LN 18	1,617.	0.		0.	
FORM 990-PF	OTHER EXPENSES (A) (B) EXPENSES NET INVEST-		(C) ADJUSTED	TATEMENT (D) CHARITABL	
DESCRIPTION	PER BOOKS				
PORTFOLIO DEDUCTIONS FROM GRESHAM GLOBAL OPPORTUNITIES K-1	17,505.	17 505		0	
PORTFOLIO DEDUCTIONS FROM	·	·		0.	
GRESHAM FOREIGN MANAGERS K-1 PORTFOLIO DEDUCTIONS FROM GRESHAM HEDGED STRATEGIES	6,959.	6,959.		0.	
K-1 PORTFOLIO DEDUCTIONS FROM GRESHAM SELECT ASSET	3,618.	3,618.		0.	
MANAGERS K-1	13,880.	13,880.		0.	
MISCELLANEOUS	218.	218.		0.	
GRESHAM FOREIGN MANAGERS LP GRESHAM HEDGED STRATEGIES LP	159. 15.	159. 15.		0.	
TO FORM 990-PF, PG 1, LN 23	42,354.	42,354.		0.	

FORM 990-PF CORPORATE STOCK		STATEMENT	9
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	?
VANGUARD INTERMED TERM	302,989.	299,84	7.
GRESHAM HEDGED STRATEGIES, LP	465,971.	465,96	·7.
GRESHAM GLOBAL OPPORTUNITIES, LP	467,040.	467,07	'5.
GRESHAM FOREIGN MANAGERS QP, LP	456,146.	456,14	6.
GRESHAM SELECT ASSET MANAGERS QP, LP	535,143.	535,27	11.
INVESTMENT IN GRESHAM	66,630.	66,62	19.
TOTAL TO FORM 990-PF, PART II, LINE 10B	2,293,919.	2,290,93	5.