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Form 990-PF

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2011

For calendar year 2011, or tax year beginning 01-01-2011 , and ending 12-31-2011

G Check all that apply

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

Name of foundation
COPELAND FAMILY FOUNDATION INC

Number and street (or P O box number if mail is not delivered to street address) Room/suite
1183 RANDOLPH AVENUE

City or town, state, and ZIP code
MILTON, MA 02186

A Employer identification number
22-2474056

B Telephone number (see page 10 of the instructions)
(617) 698-5976

C If exemption application is pending, check here ☐

D 1. Foreign organizations, check here ☐

2. Foreign organizations meeting the 85% test, check here and attach computation ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

H Check type of organization

☒ Section 501(c)(3) exempt private foundation

☐ Section 4947(a)(1) nonexempt charitable trust

☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 35,420,963

J Accounting method ☐ Cash ☒ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis.)

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	838,817	838,817	838,817	
	5a Gross rents	12,000	12,000	12,000	
	b Net rental income or (loss) 12,000				
	6a Net gain or (loss) from sale of assets not on line 10	1,004,702			
	b Gross sales price for all assets on line 6a 15,123,816				
	7 Capital gain net income (from Part IV, line 2)		1,004,702		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
Operating and Administrative Expenses	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	25,286			
	12 Total. Add lines 1 through 11	1,880,805	1,855,519	850,817	
	13 Compensation of officers, directors, trustees, etc	348,350			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).	38,059			38,059
	b Accounting fees (attach schedule).	26,050			26,050
	c Other professional fees (attach schedule)	139,156	137,403		1,373
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	60,674	23,801		19,931
	19 Depreciation (attach schedule) and depletion . . .	42,816			
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule).	148,922			148,922
	24 Total operating and administrative expenses. Add lines 13 through 23	804,027	161,204		234,335
	25 Contributions, gifts, grants paid	1,088,182			1,088,182
	26 Total expenses and disbursements. Add lines 24 and 25	1,892,209	161,204		1,322,517
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-11,404			
	b Net investment income (if negative, enter -0-)		1,694,315		
	c Adjusted net income (if negative, enter -0-)			850,817	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	42,405	414,475	414,475
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶ <u>456</u>			
		Less allowance for doubtful accounts ▶ _____	456	456	456
	4	Pledges receivable ▶ _____			
		Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____			
		Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	28,521	30,505	30,505
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	31,093,160	29,175,494	29,175,494
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ _____			
Liabilities		Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ <u>4,101,488</u>			
		Less accumulated depreciation (attach schedule) ▶ <u>331,686</u>	3,739,876	3,769,802	3,769,802
	15	Other assets (describe ▶ _____)	2,042,298	2,030,231	2,030,231
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	36,946,716	35,420,963	35,420,963
	17	Accounts payable and accrued expenses	14,857	19,500	
	18	Grants payable	20,000		
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	34,857	19,500	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted	36,911,859	35,401,463	
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions)	36,911,859	35,401,463	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	36,946,716	35,420,963	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return)	1	36,911,859
2	Enter amount from Part I, line 27a	2	-11,404
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	36,900,455
5	Decreases not included in line 2 (itemize) ▶ _____	5	1,498,992
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	35,401,463

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)	
1a					
(e) Gross sales price		(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		(h) Gain or (loss) (e) plus (f) minus (g)
a					
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69					(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69		(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any		
a					
b					
c					
d					
e					
2	Capital gain net income or (net capital loss) If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7				21,004,702
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8				3-190,325

Part V

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2010	956,574	29,734,020	0 03217
2009	895,635	27,954,426	0 03204
2008	1,721,613	26,818,477	0 06420
2007	1,471,334	36,272,321	0 04056
2006	836,500	19,312,188	0 04332
2 Total of line 1, column (d). 0 21228			
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years 0 04246			
4 Enter the net value of noncharitable-use assets for 2011 from Part X, line 5. 29,907,325			
5 Multiply line 4 by line 3. 1,269,775			
6 Enter 1% of net investment income (1% of Part I, line 27b). 16,943			
7 Add lines 5 and 6. 1,286,718			
8 Enter qualifying distributions from Part XII, line 4. 1,322,517			
If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions on page 18			

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

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 ☒ and enter 1% of Part I, line 27b		1	16,943	
c		All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)				
2		Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2		
3		Add lines 1 and 2.		3	16,943	
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4		
5		Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	16,943	
6		Credits/Payments				
a		2011 estimated tax payments and 2010 overpayment credited to 2011	6a	24,000		
b		Exempt foreign organizations—tax withheld at source	6b			
c		Tax paid with application for extension of time to file (Form 8868)	6c			
d		Backup withholding erroneously withheld	6d			
7		Total credits and payments Add lines 6a through 6d.		7	24,000	
8		Enter any penalty for underpayment of estimated tax Check here ☒ if Form 2220 is attached		8		
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9		
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	7,057	
11		Enter the amount of line 10 to be Credited to 2012 estimated tax	7,057	Refunded	11	

Part VII-AStatements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
		1a		No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?			No
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ _____ (2) On foundation managers \$ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ _____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		No
	If "Yes," attach a detailed description of the activities.			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		No
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		No
	If "Yes," attach the statement required by General Instruction T.			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either - By language in the governing instrument, or - By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) MA _____			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address  N/A	13	Yes	
14	The books are in care of  MARTHA VERDONE Telephone no  (617) 698-5976 Located at  1183 RANDOLPH AVE MILTON MA ZIP+4  02186			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here  and enter the amount of tax-exempt interest received or accrued during the year.	15		
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 account in a foreign country?	16	Yes	No
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.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person?  Yes  No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?.  Yes  No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  Yes  No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  Yes  No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?.  Yes  No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days).  Yes  No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?. Organizations relying on a current notice regarding disaster assistance check here. 	1b		No
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?.	1c		No
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  20____, 20____, 20____, 20____  Yes  No			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions).	2b		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here  20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?.  Yes  No			
b	If "Yes," did it have excess business holdings in 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2011.</i>).	3b		No
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a

During the year did the foundation pay or incur any amount to

(1)

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

YesNo

(2)

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

YesNo

(3)

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

YesNo

(4)

Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions).

YesNo

(5)

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

YesNo

b

If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.

YesNo

c

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?
If "Yes," attach the statement required by Regulations section 53.4945–5(d).

YesNo

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

YesNo

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?
If "Yes" to 6b, file Form 8870.

YesNo

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

YesNo

b

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

YesNo

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1

List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

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

2

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

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

Total

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

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
BROWN BROTHERS HARRIMAN & CO	INVESTMENT MGMT	59,185
40 WATER STREET BOSTON,MA 02109		
PRW ASSOCIATES INC	INVESTMENT MGMT	78,218
1 PINE HILL DRIVE QUINCY,MA 02169		
Total number of others receiving over \$ 50,000 for professional services.		

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See page 24 of the instructions	
3	
Total. Add lines 1 through 3.	

Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	30,134,327
b	Average of monthly cash balances.	1b	228,440
c	Fair market value of all other assets (see page 24 of the instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	30,362,767
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	30,362,767
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	455,442
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	29,907,325
6	Minimum investment return. Enter 5% of line 5.	6	1,495,366

Part XI

Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☒ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	1,495,366
2a	Tax on investment income for 2011 from Part VI, line 5.	2a	16,943
b	Income tax for 2011 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	16,943
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	1,478,423
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	1,478,423
6	Deduction from distributable amount (see page 25 of the instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	1,478,423

Part XII

Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	1,322,517
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	1,322,517
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions).	5	16,943
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,305,574
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see page 26 of the instructions)

		(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1	Distributable amount for 2011 from Part XI, line 7				1,478,423
2	Undistributed income, if any, as of the end of 2011				
a	Enter amount for 2010 only.				
b	Total for prior years 20____, 20____, 20____				
3	Excess distributions carryover, if any, to 2011				
a	From 2006.				
b	From 2007.				
c	From 2008. 314,179				
d	From 2009.				
e	From 2010.				
f	Total of lines 3a through e.	314,179			
4	Qualifying distributions for 2011 from Part XII, line 4 ▶ \$ 1,322,517				
a	Applied to 2010, but not more than line 2a				
b	Applied to undistributed income of prior years (Election required—see page 26 of the instructions)				
c	Treated as distributions out of corpus (Election required—see page 26 of the instructions). . .	0			
d	Applied to 2011 distributable amount.				1,322,517
e	Remaining amount distributed out of corpus				
5	Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a).)	155,906			155,906
6	Enter the net total of each column as indicated below:				
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5	158,273			
b	Prior years' undistributed income Subtract line 4b from line 2b.				
c	Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d	Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions . . .				
e	Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions				
f	Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011.				0
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions).				
8	Excess distributions carryover from 2006 not applied on line 5 or line 7 (see page 27 of the instructions).				
9	Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a.	158,273			
10	Analysis of line 9				
a	Excess from 2007. . . .				
b	Excess from 2008. . . . 158,273				
c	Excess from 2009. . . .				
d	Excess from 2010. . . .				
e	Excess from 2011. . . .				

Part XIVPrivate Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2011, enter the date of the ruling.

b

Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a

Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

Tax year	Prior 3 years				(e) Total
(a) 2011	(b) 2010	(c) 2009	(d) 2008		
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					

3

Complete 3a, b, or c for the alternative test relied upon

a

"Assets" alternative test—enter

(1)

Value of all assets

(2)

Value of assets qualifying under section 4942(j)(3)(B)(i)

b

"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.

c

"Support" alternative test—enter

(1)

Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2)

Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).

(3)

Largest amount of support from an exempt organization

(4)

Gross investment income

Part XVSupplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see page 27 of the instructions.)

1

Information Regarding Foundation Managers:

a

List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

b

List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2

Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a

The name, address, and telephone number of the person to whom applications should be addressed

COPELAND FAMILY FOUNDATION INC
1183 RANDOLPH AVENUE
MILTON, MA 02186

b

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

A LETTER SUMMARIZING THE PROJECT AND SPECIFY THE AMOUNT REQUESTED EVIDENCE OF TAX EXEMPT STATUS 501(C)(3)

c

Any submission deadlines

APPLICATIONS ARE ACCEPTED ANY TIME

d

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

NO RESTRICTIONS - REPLIES AS TO ACCEPTANCE REJECTION OR DEFERRAL ARE MADE PROMPTLY GEOGRAPHICAL AREA IS A FACTOR BUT NOT THE ONLY DETERMINANT

Form 990-PF (2011)

Part XV **Supplementary Information** (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> SEE ATTACHED LISTING, MA 02186	NONE	PUBLIC	CHARITABLE	1,088,182
Total  3a				1,088,182
b <i>Approved for future payment</i>				
Total  3b				

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities. . . .			14	838,817	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.			16	12,000	
6 Net rental income or (loss) from personal property					
7 Other investment income.			14	25,286	
8 Gain or (loss) from sales of assets other than inventory					1,004,702
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory. .					
11 Other revenue a _____					
b _____					
c _____					
d _____					
e _____					
12 Subtotal Add columns (b), (d), and (e). .				876,103	1,004,702
13 Total. Add line 12, columns (b), (d), and (e).			13		1,880,805

[illegible]

Part XVII

1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
a	Transfers from the reporting foundation to a noncharitable exempt organization of			
	(1) Cash.	1a(1)		No
	(2) Other assets.	1a(2)		No
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
	(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
	(3) Rental of facilities, equipment, or other assets.	1b(3)		No
	(4) Reimbursement arrangements.	1b(4)		No
	(5) Loans or loan guarantees.	1b(5)		No
	(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule		
(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge				
	*****			2012-05-16	*****
	Signature of officer or trustee			Date	Title
	Paid Preparer's Use Only	Preparer's Signature ▶ Maureen F Cody CPA		Date	Check if self-employed ▶ ☒
Firm's name ▶ Jennings Cody & Leahy			Firm's EIN ▶		
63 Winthrop Street					
	Firm's address ▶ Taunton, MA 02780			Phone no (508) 824-6622	

May the IRS discuss this return with the preparer shown above? See instructions ☒ Yes ☐ No

Additional Data

Software ID: 11000144
Software Version: 2011v1.2
EIN: 22-2474056
Name: COPELAND FAMILY FOUNDATION INC

Form 990PF - Special Condition Description:

Special Condition Description

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
RICHARD G WELLS JR	Director 1 00	6,000		
C/O 1183 RANDOLPH AVENUE MILTON,MA 02186				
RAYMOND G PELISSIER	Director 1 00	6,000		
C/O 1183 RANDOLPH AVENUE MILTON,MA 02186				
GEORGE P MORAN	Director 1 00	6,000		
C/O 1183 RANDOLPH AVENUE MILTON,MA 02186				
MARY GORMLEY	Director 1 00	6,000		
C/O 1183 RANDOLPH AVENUE MILTON,MA 02186				
JOYCE TOBIN	CLERK 40 00	86,850		
C/O 1183 RANDOLPH AVENUE MILTON,MA 02186				
JOHN TOBIN	Treasurer 40 00	121,500		
C/O 1183 RANDOLPH AVENUE MILTON,MA 02186				
MARTHA VERDONE	President 40 00	116,000		
C/O 1183 RANDOLPH AVE MILTON,MA 02186				

TY 2011 Accounting Fees Schedule**Name:** COPELAND FAMILY FOUNDATION INC**EIN:** 22-2474056**Software ID:** 11000144**Software Version:** 2011v1.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	26,050	0	0	26,050

TY 2011 Contractor Compensation Explanation

Name: COPELAND FAMILY FOUNDATION INC

EIN: 22-2474056

Software ID: 11000144

Software Version: 2011v1.2

Contractor	Explanation
PRW ASSOCIATES INC	
BROWN BROTHERS HARRIMAN & CO	

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2011 Depreciation Schedule

Name: COPELAND FAMILY FOUNDATION INC

EIN: 22-2474056

Software ID: 11000144

Software Version: 2011v1.2

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
LAND IMPROVEMENTS	2011-07-30	72,742		67	3 33 %	2,422			
BUILDING IMPROVEMENTS	2010-08-19	161,525	1,555	87	2 56 %	4,142			
COMPUTER	2009-05-12	1,995	1,098	53	18 00 %	359			
RAILING	2002-04-04	2,402	284	66	5 90 %	142			
ROOF	2009-09-30	12,682	420	87	2 56 %	325			
LAND IMPROVEMENTS - TREES	2009-11-06	11,344	851	67	6 67 %	757			
COMPUTERS	2008-11-21	8,950	3,804	54	20 00 %	1,790			
TELEPHONE EQUIPMENT	2008-07-11	500	238	54	20 00 %	100			
NEW BOILER	2008-12-05	3,310	1,407	54	20 00 %	662			
STONE WALL& DRIVEWAY EXPN	2005-11-02	9,250	2,392	91	20 0000	463			
IRRIGATION INSTALLATION	2007-10-25	6,946	580	87	2 56 %	178			
BUILDING IMPROVEMENTS	2007-11-26	52,816	4,288	87	2 56 %	1,354			
WALL FENCE	2006-09-08	14,527	4,195	91	15 0000	968			
ROOF REPAIRS	2006-08-10	19,056	5,609	91	15 0000	1,270			
FIX SHED, PORCH & RAMP	2006-07-07	4,200	1,260	91	15 0000	280			
BUILDING IMPROVEMENTS-CTC	2005-07-01	147,898	20,856	87	2 56 %	3,792			
BUILDING IMPROVEMENTS-CTC	2004-07-01	467,213	77,866	87	2 56 %	11,979			
NEW DOORS	2004-09-10	6,526	1,058	87	2 56 %	167			
BUILDING IMPROVEMENTS	2003-12-15	154,978	28,149	87	2 56 %	3,974			
BUILDING - 1183 RANDOLPH	2001-04-30	300,000	74,999	87	2 56 %	7,692			

TY 2011 Land, Etc. Schedule**Name:** COPELAND FAMILY FOUNDATION INC**EIN:** 22-2474056**Software ID:** 11000144**Software Version:** 2011v1.2

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Miscellaneous	28,267	24,066	4,201	
Land	2,584,000		2,584,000	
Improvements	93,336	6,885	86,451	
Buildings	1,350,769	257,382	1,093,387	3,769,802
Machinery and Equipment	20,878	19,320	1,558	
Furniture and Fixtures	24,238	24,033	205	

TY 2011 Legal Fees Schedule

Name: COPELAND FAMILY FOUNDATION INC

EIN: 22-2474056

Software ID: 11000144

Software Version: 2011v1.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	38,059	0	0	38,059

TY 2011 Other Assets Schedule**Name:** COPELAND FAMILY FOUNDATION INC**EIN:** 22-2474056**Software ID:** 11000144**Software Version:** 2011v1.2

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
INVESTMENT IN COPELAND PROPERTIES, LP	2,013,332	2,001,393	2,001,393
INVESTMENT IN COPELAND PROPERTIES, INC	28,966	28,838	28,838

TY 2011 Other Decreases Schedule

Name: COPELAND FAMILY FOUNDATION INC

EIN: 22-2474056

Software ID: 11000144

Software Version: 2011v1.2

Description	Amount
AJUSTMENT TO UNREALIZED GAINS	1,498,992

TY 2011 Other Expenses Schedule**Name:** COPELAND FAMILY FOUNDATION INC**EIN:** 22-2474056**Software ID:** 11000144**Software Version:** 2011v1.2

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
UTILITIES	4,849			4,849
TELEPHONE	1,288			1,288
REPAIRS & MAINTENANCE	47,337			47,337
OFFICE EXPENSES	1,913			1,913
INSURANCE	87,413			87,413
DUES & SUBSCRIPTIONS	945			945
COMPUTER ANNUAL MAINTENANCE	4,900			4,900
BANK SERVICE CHARGES	277			277

TY 2011 Other Income Schedule

Name: COPELAND FAMILY FOUNDATION INC

EIN: 22-2474056

Software ID: 11000144

Software Version: 2011v1.2

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Other Investment Income	25,286		

TY 2011 Other Professional Fees Schedule**Name:** COPELAND FAMILY FOUNDATION INC**EIN:** 22-2474056**Software ID:** 11000144**Software Version:** 2011v1.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PAYROLL SERVICE FEES	1,373	0	0	1,373
INVESTMENT ADVICE	137,403	137,403	0	0
CONSULTING & OTHER	380	0	0	0

TY 2011 Taxes Schedule**Name:** COPELAND FAMILY FOUNDATION INC**EIN:** 22-2474056**Software ID:** 11000144**Software Version:** 2011v1.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
REAL ESTATE TAXES	8,239			8,239
PAYROLL TAXES	23,383	11,692		11,692
FOREIGN TAXES	12,109	12,109		
FEDERAL TAXES	16,943			

COPELAND FAMILY FOUNDATION, Inc.
Grants
January 1, 2011 through December 31, 2011

January 7, 2011

Town of Whitman Police Department	\$10,407.18
P.O. Box 318 Whitman, MA 02382	
- payoff lease on 2007 DARE Jeep	

March 16, 2011

Neponset River Watershed Association	\$20,000.00
2173 Washington St. Canton, MA 02021	
- challenge grant (voted 11/18/09)	

May 18, 2011

Milton Council on Aging	\$25,000.00
Ten Walnut Street Milton, MA 02186	
- operation of the Council's van	

Milton Cemetery	\$10,000.00
211 Centre Street Milton, MA 02186	
- for treework	

Milton Hospital	\$10,000.00
199 Reedsdale Road Milton, MA 02186	
- for landscaping	

Evergreen Cemetery	\$10,000.00
Michael Maltby	
43 Appalowsa Circle Tyngsboro, MA 01879	
- general operating support	

Interfaith Social Services	\$10,000.00
105 Adams St. Quincy, MA 02170	
- general operating support	

Camp Sunshine	\$6,000.00
35 Acadia Rd. Casco, ME. 04015	
- support sick children and families from Milton	

Massachusetts Easter Seals 484 Main St. Worcester, MA 01608 - \$3,000.00 Camp Agassiz - \$3,000.00 Camp Hemlock	\$6,000.00
Boston Natural Area Network 62 Sumner St. Boston, MA 02110 - support Milton teens on the Neponset River Greenway Summer 2012 Youth Conservation Corps.	\$5,000.00
Father Bill's & Mainspring 422 Washington Street Quincy, MA 02169 - " Spring for Hope Campaign"	\$5,000.00
Mass Audubon 500 Walk Hill St. Mattapan, MA 02126 - Summer Day Camp at Boston Nature Center	\$5,000.00
POW-MIA Eternal Flame Foundation, Inc. 210 Grove St. Randolph, MA 02368 - fundraising for memorial to be built in Boston	\$5,000.00
S.T.R.I.V.E. 651 Washington St. Dorchester, MA 02124 - general operating support	\$5,000.00
Work, Inc. 25 Beach St. Dorchester, MA 02122 - general operating support	\$5,000.00
City of Quincy 79 West Elm Ave. Quincy, MA 02170 - Friends of Wollaston Beach	\$2,500.00
Celebrate Milton P.O. Box 870074, Milton, MA 02186	\$1,975.00
Pan Mass Challenge 77 Fourth Ave. Needham, MA 02494 - in support of Pauline Wells	\$1,000.00
Milton Park Department 525 Canton Avenue Milton, MA 02186 - sponsor August 2, 2011 Summer Concert	\$600.00

Milton Little League 1250 Randolph Avenue Milton, MA 02186 - All Star Cooperstown Team	\$250.00
--	----------

D.A.R.E.- Drug Abuse Resistance Education for the following towns:

Town of Milton Police Department 40 Highland St. Milton, MA 02186	\$15,000.00
City of Quincy Police Department One Sea St. Quincy, MA 02169	\$10,000.00
Town of Dover Police Department 3 Walpole St. Dover, MA 02030	\$5,000.00
Town of Hanover Police Department 129 Rockland St. Hanover, MA 02339	\$5,000.00
Town of Hingham Police Department 212 Central St. Hingham, MA 02043	\$5,000.00
Town of Marshfield Police Department 1639 Ocean Street Marshfield, MA 02050	\$5,000.00
Town of Millis Police Department 885 Main St. Millis, MA 02054	\$5,000.00
Town of Rockland Police Department 490 Market St. Rockland, MA 02370	\$5,000.00
Town of Scituate Police Department 604 Chief Justice Cushing Hwy. Scituate, MA 02066	\$5,000.00
Town of Whitman Police Department P.O. Box 348 Whitman, MA 02382	\$5,000.00

Animal Shelters - support of facility for the following organizations:

All Paws Rescue P.O. Box 569 Accord, MA 02018-0569	\$5,000.00
Animal Rescue League of Boston, Inc. 10 Chandler St. Boston, MA 02116	\$5,000.00

Canine Connections, Inc. PMB 242 Canton, MA 02021	\$5,000.00
Town of Canton 801 Washington St. Canton, MA 02021	\$5,000.00
Town of Duxbury 878R Tremont St. Duxbury, MA 02332	\$5,000.00
Greyhound Friends, Inc. 167 Saddle Hill Rd. Hopkington, MA 01748	\$5,000.00
Greyhound Pets of America P.O. Box 1495 Middleboro, MA 02346	\$5,000.00
Town of Holbrook 50 North Franklin St. Holbrook, MA 02343	\$5,000.00
Hull Seaside Animal Rescue, Inc. P.O. Box 787 Hull, MA 02045	\$5,000.00
MSPCA 350 S. Huntington Ave. Boston, MA 02130	\$5,000.00
Milton Animal League Box 43 Milton, MA 02186	\$5,000.00
Neponset Valley Humane Society, Inc. P.O. Box 544 Norwood, MA 02062	\$5,000.00
City of Quincy One Sea St. Quincy, MA 02169	\$5,000.00
Friends of the Scituate Shelter 780 Chief Justice Hwy. Scituate, MA 02066	\$5,000.00
South Shore Humane Society Box 850157 Braintree, MA 02185	\$5,000.00
Standish Humane Society P.O. Box 634 Duxbury, MA 02331	\$5,000.00
Town of Stoughton 10 Pearl St. Stoughton, MA 02072	\$5,000.00

Town of Whitman	\$5,000.00
P.O. Box 348 Whitman, MA 02382	

Food Pantries - supporting operation of food pantries for the following organizations:

St. Vincent dePaul Society	\$5,000.00
455 Plymouth Ave. Abington, MA 02351	
American Red Cross	\$5,000.00
139 Main St. Cambridge, MA. 02143	
Braintree Community Food Pantry	\$5,000.00
594 Washington St. Braintree, MA 02184	
Canton Area Helpline, Inc.	\$5,000.00
P.O. Box 202	
715 B Washington St. Canton, MA 02021	
Dedham Food Pantry Charitable Trust	\$5,000.00
P.O. Box 46 Dedham, MA 02027	
dotwell	\$5,000.00
1452 Dorchester Ave. Dorchester, MA 02122	
Little Sisters of the Assumption	\$5,000.00
Family Health Service, Inc.	
550 Dudley St. Roxbury, MA 02119	
Hanover Emergency Food Pantry	\$5,000.00
580 Webster St. Hanover, MA 02339	
Hingham Interfaith Food Pantry	\$5,000.00
685 Main St. Hingham, MA 02043	
Wellspring, Inc.	\$5,000.00
814 Nantasket Ave. Hull, MA 02045	
Marshfield Food Pantry	\$5,000.00
P.O. Box 1097 Marshfield, MA 02050	
Medfield Food Cupboard	\$5,000.00
P.O. Box 172 Medfield, MA 02052	
Medway Food Pantry	\$5,000.00
600 Mahan Circle, Medway, MA 02053	

Millis Ecumenical Food Pantry 142 Exchange St. Millis, MA 02054	\$5,000.00
Milton Food Pantry 158 Blue Hills Pkwy. Milton, MA 02186	\$5,000.00
Norwell Emergency Food Pantry P.O. Box 644 Norwell, MA 02061	\$5,000.00
Ecumenical Community Food Pantry of Norwood, Inc. 150 Chapel St. Norwood, MA 02062	\$5,000.00
Pembroke Food Pantry P.O. Box 295 Pembroke, MA 02059	\$5,000.00
South Shore Community Action Council, Inc. - Plymouth 265 South Meadow Rd. Plymouth, MA 02360	\$5,000.00
Scituate Church Pantry, Inc. P.O. Box 120 Scituate, MA 02066	\$5,000.00
Walpole Community Food Pantry P.O. Box 43 Walpole, MA 02081	\$5,000.00
Westwood Food Pantry 60 Nahatan St. Westwood, MA 02190	\$5,000.00
Weymouth Food Pantry P.O. Box 890009 Weymouth, MA 02189	\$5,000.00
Catholic Charities South 169 Court St. St. Brockton, MA 02302	\$2,500.00
St. Matthew's Emergency Food Pantry 33 Stanton St. Dorchester, MA 02124	\$2,500.00
Germantown Neighborhood Center 366 Palmer St. Quincy, MA 02169	\$2,500.00
Quincy Community Action Programs, Inc. One Copeland St. Quince, MA 02169	\$2,500.00

Food Pantries

Quincy Crisis Center P.O. Box 31 Quincy, MA 02170	\$2,500.00
The Pantry Shelf – Quincy 105 Adams St. Quincy, MA 02170	\$2,500.00
St. Vincent dePaul Society 403 Union St. Rockland, MA 02370	\$2,500.00
Rockland Emergency Food Pantry 12 Church St. Rockland, MA 02370	\$2,500.00
St. Anthony's Free Market 2 Park Ave. Stoughton, MA 02072	\$2,500.00
Stoughton Food Pantry P.O. Box 812 Stoughton, MA 02072	\$2,500.00
St. Vincent dePaul Society 518 Washington St. Whitman, MA 02382	\$2,500.00
Whitman Food Pantry 33 Pleasant St. Whitman, MA 02382	\$2,500.00

June 10, 2011

American Red Cross Massachusetts Bay Chapter 139 Main St. Cambridge, MA 02142 - Central and Western MA Disaster Relief	\$15,000.00
Milton Public Schools 25 Gile Rd. Milton, MA 02186 - Smartboards for elementary and middle school art classrooms	\$12,150.00
Brookwood Community Farm 18 Capen St. Milton, MA 02186 - 2 Summer Interns	\$2,800.00

November 9, 2011

Milton 350 th Anniversary 525 Canton Ave. Milton , MA 02186 - support if year- long anniversary celebration	\$150,000.00
Milton Public Library 476 Canton Ave. Milton, MA 02186 - establish Copeland Endowment Fund for Books	\$100,000.00
Milton Public Schools 25 Gile Rd. Milton, MA 02186 - establish Copeland Family Foundation Scholarship	\$100,000.00
Milton Residents Fund 535 Canton Ave. Milton, MA 02186 - support for housing, utilities, and fuel for poor	\$35,000.00
Gavin Foundation 675 East Fourth St. So. Boston, MA 02127 - Gavin House - \$10,000.00 - Cushing House - \$10,000.00	\$20,000.00
Friends of the Paragon Carousel P.O. Box 100 Hull, MA 02045 - general operating support	\$10,000.00
Helping Hands 541 Cambridge St. Boston, MA 02134 - general operating support	\$10,000.00
Milton Public Library 476 Canton Ave. Milton, MA 02186 - purchase books	\$10,000.00
National Education for Assistance Dog Services P.O. Box 213 West Boylston, MA 01583 - general operating support	\$10,000.00
Old Colony Council 2438 Washington St. Canton, MA 02021 - Camp Squanto	\$10,000.00

Partners Home Care 281 Winter St. Suite 240 Waltham, MA 02451 - purchase telemonitors for Milton residents	\$10,000.00
Perkins School for the Blind 175 North Beacon St. Watertown, MA 02172 - general operating support	\$10,000.00
Trailside Museum 1904 Canton Ave. Milton, MA 02186 - provides affordable environmental education	\$10,000.00
American Red Cross 139 Main St. Cambridge, MA 02143 - general operating support	\$5,000.00
Association of Small Foundations 1720 N. St. NW Washington, DC 20036 - general operating support	\$5,000.00
Cops for Kids with Cancer P.O. Box 850956 Braintree, MA 02185 - general operating support	\$5,000.00
Forbes House Museum 215 Adams St. Milton, MA 02186 - general operating support	\$5,000.00
Hull Lifesaving Museum, Inc. P.O. Box 221 Hull, MA 02045 - general operating support	\$5,000.00
Lend a Hand – Patriot Ledger P.O. Box 699159 Quincy, MA 02269 - support to the needy over the holidays	\$5,000.00
Lucky Horse Equine P.O. Box 741 Townsend, MA 01469 - general operating support	\$5,000.00
Milton Cemetery 211 Centre St. Milton, MA 02186 - for tree damage	\$5,000.00

Morgan Memorial Goodwill Industries, Inc. 1010 Harrison Ave. Boston, MA 02119	\$5,000.00
North Bennett St. School 39 North Bennett St. Boston, MA 02113 - general operating support	\$5,000.00
Salvation Army 147 Berkeley St. Boston, MA 02116 - general operating support	\$5,000.00
Talking Information Center, Inc. 130 Enterprise Dr. Randolph, MA 02368 - general operating support	\$5,000.00
Wings Over America 3033 N St. Washington, DC 20007 - American Heroes Saltwater Challenge	\$5,000.00
Zoo New England One Franklin Park Rd. Dorchester, MA 02121 - general operating support	\$5,000.00
Smile Train 41 Madison Ave. 28 th floor New York, NY 10010 - general operating support	\$2,500.00
Hull High School 180 Main St. Hull, MA 02045 - Michael Powers Memorial Scholarship	\$1,000.00
Memorial United Church Cemetery P.O. Box 394 Bonavista, NL AOC IBO	\$1,000.00

Food Pantries

St. Vincent DePaul Society 455 Plymouth Ave. Abington, MA 02352	\$2,500.00
American Red Cross 139 Main St. Cambridge, MA 02143	\$2,500.00
Braintree Community Food Pantry 594 Washington St. Braintree, MA 02184	\$2,500.00

Canton Area Helpline, Inc. P.O. Box 202 Canton, MA 02021	\$2,500.00
Dedham Food Pantry Charitable Trust P.O. Box 46 Dedham, MA 02027	\$2,500.00
Little Sisters of the Assumption Family Health Service, Inc. 550 Dudley St. Roxbury, MA 02119	\$2,500.00
Hanover Emergency Food Pantry 580 Webster St. Hanover, MA 02339	\$2,500.00
Hingham Interfaith Food Pantry 685 Main St. Hingham, MA 02043	\$2,500.00
Wellspring, Inc. 814 Nantasket Ave. Hull, MA 02045	\$2,500.00
Marshfield Food Pantry P.O. Box 1097 Marshfield, MA 02050	\$2,500.00
Medfield Food Cupboard P.O. Box 172 Medfield, MA 02052	\$2,500.00
Medway Food Pantry 600 Mahan Circle Medway, MA 02053	\$2,500.00
Millis Ecumenical Food Pantry 142 Exchange St. Millis, MA 02054	\$2,500.00
Milton Food Pantry 158 Blue Hills Pkwy. Milton, MA 02186	\$2,500.00
Norwell Emergency Food Pantry P.O. Box 644 Norwell, MA 02061	\$2,500.00
Ecumenical Community Food Pantry of Norwood, Inc. 150 Chapel St. Norwood, MA 02062	\$2,500.00
Pembroke Food Pantry P.O. Box 295 Pembroke, MA 02059	\$2,500.00
South Shore Community Action Council, Inc. 265 South Meadow Rd. Plymouth, MA 02360	\$2,500.00

Scituate Church Pantry, Inc. P.O. Box 120 Scituate, MA 02066	\$2,500.00
Walpole Community Food Pantry P.O. Box 43 Walpole, MA 02081	\$2,500.00
Westwood Food Pantry 60 Nahatan St. Westwood, MA 02190	\$2,500.00
Weymouth Food Pantry P.O. Box 890009 Weymouth, MA 02189	\$2,500.00
Catholic Charities South 169 Court St. Brockton, MA 02401	\$1,250.00
St. Matthew's Emergency Food Pantry 33 Stanton St. Dorchester, MA 02124	\$1,250.00
Germantown Neighborhood Center 366 Palmer St. Quincy, MA 02169	\$1,250.00
Quincy Community Action Programs, Inc. One Copeland St. Quincy, MA 02169	\$1,250.00
Quincy Crisis Center P.O. Box 31 Quincy, MA 02170	\$1,250.00
The Pantry Shelf 105 Adams St. Quincy, MA 02170	\$1,250.00
St. Vincent DePaul Society 403 Union St. Rockland, MA 02370	\$1,250.00
Rockland Emergency Food Pantry 12 Church St. Rockland, MA 02370	\$1,250.00
St. Anthony's Free Market 2 Park Ave. Stoughton, MA 02072	\$1,250.00
Stoughton Food Pantry P.O. Box 812 Stoughton, MA 02072	\$1,250.00
St. Vincent DePaul Society 518 Washington St. Whitman, MA 02382	\$1,250.00

Whitman Food Pantry
33 Pleasant St. Whitman, MA 02382

\$1,250.00

Total

\$1,103,182.18

*Town of Westwood Police Department
590 High Street, Westwood, MA 02090
DARE Program*

5,000.00

Total

\$ 1,108,182.18