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Form **990-PF**

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

Department of the Treasury internal Revenue Service

| rui | <u>al</u> en | dar year 2011 or tax year beginning | | , and ending | | |
|----------------------------|--------------|---|------------------------------|----------------------|--|--|
| | | foundation | | | A Employer identification | number |
| - | 041 | EPH F. & EDNA SLAVIK FO | IINTO A MIT ON | | 38-2744923 |) |
| | | THE F. EDINA SLAVIK FU | | Room/suite | |) |
| | | • | aud: 633) | 222 | B Telephone number (248)203-0 | \n11 |
| | | 00 TELEGRAPH ROAD | | 222 | _ | |
| | | own, state, and ZIP code GHAM FARMS, MI 48025 | | | C If exemption application is p | bending, check here |
| | | all that apply: Initial return | Initial return of a fo | ormer public charity | D 1. Foreign organization | s check here |
| u c | HIECK | Final return | Amended return | orner public chanty | 1. Foreign organization | s, theth here |
| | | Address change | Name change | | Foreign organizations management 2. check here and attach co | eeting the 85% test, |
| — | heck | type of organization: X Section 501(c)(3) ex | | | 7 | |
| Ϊ | _ | | Other taxable private founda | ation | E If private foundation sta under section 507(b)(1 | |
| ı Fa | | rket value of all assets at end of year J Accounting | | Accrual | F if the foundation is in a | |
| | | · ! | her (specify) | | under section 507(b)(1 | |
| | \$ | 798,895. (Part I, colu | | basis.) | 2.100.000.01.00.(2)(|)(D), 0.1001.11.DIC \$ 0.000. |
| | rt I | Analysis of Revenue and Expenses | (a) Revenue and | (b) Net investment | (c) Adjusted net | (d) Disbursements |
| | | (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) | expenses per books | income | income | for charitable purposes (cash basis only) |
| | 1 | Contributions, gifts, grants, etc., received | | | | |
| | 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 | 25,113. | 25,113. | | STATEMENT 1 |
| | 5a | Gross rents | | | | |
| | b | Net rental income or (loss) | | | | |
| ø) | 6a | Net gain or (loss) from sale of assets not on line 10 | 23,528. | | | |
| Ž | b | Gross sales price for all assets on line 6a 191,013. | | | | |
| Revenue | 7 | Capital gain net income (from Part IV, line 2) | | 23,528 | , | |
| E | 8 | Net short-term capital gain | | | | |
| | 9 | Income modifications | | | | <u> </u> |
| | 10a | Gross sales less returns and allowances | | | | |
| | Ь | Less Cost of goods sold | | | | |
| | C | Gross profit or (loss) | | | | |
| | 11 | Other income | | | | <u> </u> |
| | 12 | Total Add lines 1 through 11 | 48,641. | 48,641. | 0. | |
| | 13 | Compensation of officers directors, trustees etc | 0. | 0. | . 0 . | . 0. |
| | 14 | Other employee salaries and wages | | | | |
| G | 15 | Pension ans, employee benefits | | | | - |
| nse | | Legal fees | 4 555 | | | |
| De la | 5 | Accounting fees Other professional fees 012 Interest | 1,575. | 0. | . 0 | . 0. |
| Ü |) (| Other professional fees 012 | | | ļ | |
| Ę | | Interest Company | 1 407 | | | |
| štra | 18 | Taxes OGDEN, UT STMT 3 | 1,497. | 0. | . 0 | 0. |
| Ë | 1 | Depreciation and deptetion | | | | |
| and Administrative Expense | 20 | Occupancy | <u> </u> | | | |
| Ā | 21 | Travel, conferences, and meetings | | | - | |
| an | 22 | Printing and publications Other expenses STMT 4 | 5,667. | 5,667 | . 0 | . 0. |
| Operating | 23 24 | Other expenses STMT 4 Total operating and administrative | 5,007. | 5,00/ | · | |
| era era | 24 | expenses. Add lines 13 through 23 | 8,739. | 5,667 | . 0 | . 0. |
| 2012 Oper | 25 | Contributions, gifts, grants paid | 77,075. | 5,007 | · | 77,075. |
| | i | Total expenses and disbursements. | 11,013. | | | 11,013. |
| ි ල | 26 | Add lines 24 and 25 | 85,814. | 5,667 | . 0 | 77,075. |
| _ | 27 | Subtract line 26 from line 12: | 03,014. | 3,007 | <u> </u> | 17,075 |
| JUL | 1 | | -37,173. | | | |
| | 1 | Excess of revenue over expenses and disbursements Net investment income (if negative, enter -0-) | -31,113. | 42,974 | | |
| ij | 1 | Adjusted net income (if negative, enter -0-) | | 34,713 | 0 | |







| D | art | Balance Sheets Attached schedules and amounts in the description | Beginning of year | End of | year |
|----------------------------|----------|--|--------------------|----------------|---------------------------|
| | ai L | column should be for end-of-year amounts only | (a) Book Value | (b) Book Value | (c) Fair Market Value |
| | 1 | Cash - non-interest-bearing | | | |
| | | Savings and temporary cash investments | 33,164. | 6,445. | 6,445. |
| | 3 | Accounts receivable ▶ | | | |
| | | Less: allowance for doubtful accounts ▶ | | | |
| | 4 | Pledges receivable ► | | | |
| | | Less: allowance for doubtful accounts ▶ | | | |
| | 5 | Grants receivable | | | |
| | 6 | Receivables due from officers, directors, trustees, and other | | | |
| | | disqualified persons | | , | |
| | 7 | Other notes and loans receivable | | | |
| | | Less; allowance for doubtful accounts ▶ | | | |
| 20 | 8 | Inventories for sale or use | | | |
| Assets | l | Prepaid expenses and deferred charges | | | |
| Ą | I | Investments - U.S. and state government obligations | | | |
| | į . | Investments - corporate stock STMT 5 | 421,473. | 413,586. | 422,096. |
| | ì | Investments - corporate bonds STMT 6 | 370,018. | 367,451. | 370,354. |
| | | Investments - land, buildings, and equipment basis | | | |
| | | Less accumulated depreciation | } | - | |
| | 12 | Investments - mortgage loans | | | |
| | 13 | Investments - other | | | |
| | 1 | Land, buildings, and equipment: basis | | | |
| | { ' ' | Less accumulated depreciation | | | |
| | 15 | Other assets (describe) | | | |
| | 15 | Office assets (describe | | | |
| | 16 | Tatal anasta (to be completed by all filers) | 824,655. | 787,482. | 798,895. |
| _ | 16 17 | Total assets (to be completed by all filers) | 024,033. | 707,402. | 130,033. |
| | 18 | Accounts payable and accrued expenses | | | |
| | 1 | Grants payable | | | |
| Liabilities | 19 | Deferred revenue | | | |
| Ξ | 20 | Loans from officers, directors, trustees, and other disqualified persons | | | |
| Lia | 21 | Mortgages and other notes payable | | | |
| | 22 | Other liabilities (describe) | | | |
| | | Tatal Paking a /add hass 47 Abassah 00) | | , | |
| _ | 23 | Total liabilities (add lines 17 through 22) | 0. | 0. | |
| | | Foundations that follow SFAS 117, check here | | | |
| ģ | | and complete lines 24 through 26 and lines 30 and 31 | | | |
| ĕ | | Unrestricted | | | |
| ala | 25 | Temporarily restricted | | | |
| d B | 26 | Permanently restricted | | | |
| Ē | | Foundations that do not follow SFAS 117, check here | | | |
| F | 1 | and complete lines 27 through 31. | | | |
| ţ | 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. | |
| Net Assets or Fund Balance | 29 | Retained earnings, accumulated income, endowment, or other funds | 824,655. | 787,482. | |
| ž | 30 | Total net assets or fund balances | 824,655. | 787,482. | |
| | | | | | |
| _ | 31 | Total liabilities and net assets/fund balances | 824,655. | 787,482. | |
| P | art | Analysis of Changes in Net Assets or Fund B | alances | | |
| Ξ | | | | | |
| 1 | | net assets or fund balances at beginning of year - Part II, column (a), line | 30 | | |
| | - | st agree with end-of-year figure reported on prior year's return) | | 1 | 824,655. |
| | | r amount from Part I, line 27a | | 2 | <u>-37,173.</u> |
| | | r increases not included in line 2 (itemize) | | 3 | 0. |
| | | lines 1, 2, and 3 | | 4 | 787,482. |
| 5 | Decr | eases not included in line 2 (itemize) | | 5 | <u> </u> |
| <u>6</u> | Total | net assets or fund balances at end of year (line 4 minus line 5) - Part II, co | olumn (b), line 30 | | <u>787,482.</u> |
| | | | | | Form 990-PF (2011) |

JOSEPH F. & EDNA SLAVIK FOUNDATION

38-2744923 Page 2

Form 990-PF (2011)

6

7

8

430.

70,524.

77,075.

Add lines 5 and 6

See the Part VI instructions.

Enter 1% of net investment income (1% of Part I, line 27b)

8 Enter qualifying distributions from Part XII, line 4

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.

| | m 990-PF (2011) JOSEPH F. & EDNA SLAVIK FOUNDATION | 040(2) == 4 | | 2744 | | | Page 4 |
|---|---|----------------------|-------|--------|-------|-------|------------|
| | art VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4 | 940(e), or 4 | 948 - | see II | nstru | Ctioi | 15) |
| 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 instructi | | | | | | |
| b | Domestic foundations that meet the section 4940(e) requirements in Part V, check here 🕒 🗓 and enter 1% | · | 1 | | | 4_ | <u>30.</u> |
| | of Part I, line 27b | | | | | | |
| | e All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, co | l. (b). ノ | | | | | _ |
| | Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) | | 2 | | | | <u> 0.</u> |
| _ | Add lines 1 and 2 | | 3 | | | 4 | <u>30.</u> |
| 4 | Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) | | 4 | | | | <u> 0.</u> |
| 5 | Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0- | | 5 | | | 4 | <u>30.</u> |
| 6 | Credits/Payments: | | | | | | |
| | a 2011 estimated tax payments and 2010 overpayment credited to 2011 | | | | | | |
| | b Exempt foreign organizations - tax withheld at source 6b | | | | | | |
| | c Tax paid with application for extension of time to file (Form 8868) 6c | | 1 | | | | |
| | 1 Backup withholding erroneously withheld Table and anymosts. Add lines Co through Cd. | | _ | | | | ^ |
| _ | Total credits and payments. Add lines 6a through 6d | | 7 | | | | <u>o.</u> |
| 8 | Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached | _ | _8 | | | | 2.0 |
| | Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed | | 9 | | | - 4 | <u>30.</u> |
| | Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid |]p.cd.d | 10 | | | | |
| | Enter the amount of line 10 to be: Credited to 2012 estimated tax ▶ art VII-A Statements Regarding Activities | Refunded | 11 | | | | |
| | a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it particle | nate or intervene | ın | | | Yes | No |
| 14 | any political campaign? | pate of intervente | 104 | | 1a | | X |
| h | Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions | for definition\2 | | | 1b | | X |
| ٠ | If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any ma | | ed or | | 15 | | -2- |
| | distributed by the foundation in connection with the activities | aterials published | .u o, | | ļ | 1 | ļ |
| c | c Did the foundation file Form 1120-POL for this year? | | | | 1c | | x |
| | d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: | | | | | | |
| Ī | (1) On the foundation. \triangleright \$ (2) On foundation managers. \triangleright \$ | 0. | | | ļ | | { |
| е | E Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on | | - | | | | |
| - | managers. ► \$ 0 . | | | | 1 | | |
| 2 | Has the foundation engaged in any activities that have not previously been reported to the IRS? | | | | 2 | | x |
| | 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 | of incorporation, o | or | | | | |
| | bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes | | | | 3 | | X |
| 48 | a Did the foundation have unrelated business gross income of \$1,000 or more during the year? | | | | 4a | | X |
| b | o If "Yes," has it filed a tax return on Form 990-T for this year? | | N | /A | 4b | | |
| 5 | Was there a liquidation, termination, dissolution, or substantial contraction during the year? | | | | 5 | | X |
| | 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 con | flict with the state | e law | | · | | |
| | remain in the governing instrument? | | | | 6_ | X | |
| 7 | Did the foundation have at least \$5,000 in assets at any time during the year? | | | | 7 | X | |
| | If "Yes," complete Part II, col. (c), and Part XV. | | | | | | |
| 8a | a Enter the states to which the foundation reports or with which it is registered (see instructions) 🕨 | | | | l | | |
| | MI | | | | | | |
| b | o If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or c | iesignate) | | | | | |
| | of each state as required by General Instruction G? If "No," attach explanation | | | | 8b_ | X | |
| 9 | Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4 | 1942(j)(5) for cale | endar | | | | |
| | year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV | | | | 9 | | X |
| 10 Did any persons become substantial contributors during the tax year? If "Yes " attach a schedule listing their names and addresses | | | | | 10 | | l X |

Form **990-PF** (2011)

| Part VII-A Statements Regarding Activities (continued) 11 | | | <u>8-2744</u> | <u>923</u> | { | Page 5 |
|---|----|--|---------------|---------------|----------|----------|
| section 12(b)(13)* If "ex", attach schedule (see instructions) 10 of the foundation make a distribution to 3 doing advased fund over which the foundation or a dequalitied person had advisory privileges? 11 "Yes", attach statement (see instructions) 13 Det the foundation comply with the public inspection requirements for its annual returns and exemption application? 14 The books are in care of \$\times M\$\$. BERNEDA MEEKS 15 Section 497(a)(1) nonexempt charactile trusts fring Form 990-PF in lev of Form 101-1 check here and ether the amount of tax-everint interest received on accured during the year 15 Section 497(a)(1) nonexempt charactile trusts fring Form 990-PF in lev of Form 101-1 check here and ether the amount of tax-everint interest received on accured 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, see the instructions for exceptions and fining requirements for Form 10 F90-22.1. If "Yes", enter the name of the form 4720 than yit term is checked in the "Yes" column, unless an exception applies. 15 Form 4720 than yit term is checked in the "Yes" column, unless an exception applies. 16 Form 4720 than yit term is checked in the "Yes" column, unless an exception applies. 17 Formation and the foundation of the year of property with a disqualified person? 18 Form 4720 than yit term is checked in the "Yes" column, unless an exception applies. 19 Formation provides, services, or facilities to (or accept them from) a disqualified person? 19 Formation provides, services, or facilities to (or accept them from) a disqualified person? 19 Formation provides, services, or facilities to (or accept them from) a disqualified person? 10 Formation provides an applied to a given the acceptation of the formation of government service, it terminating within 90 days.) 10 Formation provides an applied person? 11 Formation provides an applied person? 12 Formation provides an applied person? 13 Formation provides an appl | Pa | rt VII-A Statements Regarding Activities (continued) | | | -· | |
| 12 Did the foundation make a distribution to a dinor advised fund over which the foundation or a dequalified person had advisory privilegas? 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Without addies ≥ N/A 17 The blooks are on a cere of ► MS. BERNEDA MEEKS Telephone no. ► (617) 332–0384 ZIP-4 ► 02458 Section 49/3(1/4) innocarge it carbaits brusts filling from 99-PF in les up if form 1041 - Check here and einer the amount of tax-exempt intress received or accrued during the year and einer the amount of tax-exempt intress received or accrued during the year At any time during calendary 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? A set the interest private of the foundation (either directly) The TVI-B IS Istatements 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. 10 Jump the year of the foundation (either directly) or indirectly); (1) Engage in the said or exhange, or essange of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept if thron) as disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or remitties the expenses of, a disqualified person? (5) Transfer any moome or assets to a disqualified person or the foundation of powerment service, if terminating within 90 disqualified person? (6) Agree to pay money or groperty to a government official? (Exception, Check No' if the foundation agried to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 dispus. 10 Did the foundation engage in an ory view in any of the acceptance of the exceptions described in Regulations section 53,444(4),63 or in a cu | 11 | At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of | | | i | - |
| If Yes, attach statement (see instructions) 13 | | section 512(b)(13)? If "Yes," attach schedule (see instructions) | | 11 | | _X_ |
| 13 | 12 | Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory pro- | vileges? , | | ` | |
| Website address ► M/A 1 The books are in care of ► MS. BERNEDA MEEKS Located at ► 260 WAVERLY AVE., NEWTON, MA 2/P+4 ► 02458 15 Section 48/7(a)(1) nonexempt charinable trusts filing form 90-PF in lieu of Form 1041 - Check here and eather the amount of flax-exempt interest received or accrued during the year and eather the amount of flax-exempt interest received a carcied 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 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? File Form 4720 if any them is checked in the "Yes" column, unless an exception applies. 10 Jurning they avid dit the foundation (letter during) or indirectly); (1) Engage in the sale or exchange, or lessing of property with a disqualified person? (2) Biorrow money from, lend money to, or otherwise extended ordeft to (are 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) Agree to pay money or property to a government official? (exception, Check 'No' if the foundation appeal to make a grant to or to emptoy the official for a period after termitation of government service, if terminating within 50 days.) (6) I ray answer is "Yes" to 14(1)-(6), did any of the acts fall to qualify under the exceptions described in Regulations seation 53-44(1)-(6) or in a current notice regarding disaster assistance (see instructions)? (7) Cryanizations relying on a current notice regarding disaster assistance (see instructions)? (8) Agree to pay money or property to a government official? (exception, Check 'No' if the foundation engage in a prior year in any of the acts described in 12, other than excepted acts, that were not corrected before the founda | | If "Yes," attach statement (see instructions) | | 12 | | <u>X</u> |
| 14. The books are in care of ▶ MS. BERNEDA MEEKS Telephone no. ▶ (6.17) 332-0384 Located at ₱ √260 WAVERLY AVE. NEWTON, MA 15. Section 4947(a)(1) none-empt charactic trusts filing Form 990-PF in fear of Form 1041 - Check here and effect the amount of tax-exempt interest received or accrued duming the year of At any time duming pleaned 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? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If Yes, either the name of the foreign country. Part VII-B Statements Regarding Activities for Whitch Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 10. During the year did the foundation (either directly or indirectly): 11. Engage in the safe or exchange, or issuing of property with a disqualified person? 12. Borrow money from, lend money to, or otherwise extend credit to (or accept it from) as disqualified person? 13. Furnish goods, services, or facilities to (or accept them from) a disqualified person? 14. Pay compensation to, or pay or remburse the expenses of, a disqualified person? 15. Transfer any income or assets to a disqualified person? 16. Agree to any money or property to a government official" (Exception, Check 'No' if the foundation appeal to make a grant to or to employ the official for a period after turnish and or government saverup, at terminant on the expension of the acts fail to qualify under the exceptions described in Regulations section 53.4941(6)-3 or in a current notice regarding disaster assistance (see instructions)? 16. Agree to any money or propriety under the exceptions described in Regulations section 54.942(6): 3 or in a current notice regarding disaster assistance check here 17. Definition of the condition engage in a prior year in any of the acts distributed income (tens 64 and 6e, Part XIII) for tax year(5) beginning the fore y | 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? | | 13 | X | |
| 14. The books are in care of ▶ MS. BERNEDA MEEKS Telephone no. ▶ (6.17) 332-0384 Located at ₱ √260 WAVERLY AVE. NEWTON, MA 15. Section 4947(a)(1) none-empt charactic trusts filing Form 990-PF in fear of Form 1041 - Check here and effect the amount of tax-exempt interest received or accrued duming the year of At any time duming pleaned 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? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If Yes, either the name of the foreign country. Part VII-B Statements Regarding Activities for Whitch Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 10. During the year did the foundation (either directly or indirectly): 11. Engage in the safe or exchange, or issuing of property with a disqualified person? 12. Borrow money from, lend money to, or otherwise extend credit to (or accept it from) as disqualified person? 13. Furnish goods, services, or facilities to (or accept them from) a disqualified person? 14. Pay compensation to, or pay or remburse the expenses of, a disqualified person? 15. Transfer any income or assets to a disqualified person? 16. Agree to any money or property to a government official" (Exception, Check 'No' if the foundation appeal to make a grant to or to employ the official for a period after turnish and or government saverup, at terminant on the expension of the acts fail to qualify under the exceptions described in Regulations section 53.4941(6)-3 or in a current notice regarding disaster assistance (see instructions)? 16. Agree to any money or propriety under the exceptions described in Regulations section 54.942(6): 3 or in a current notice regarding disaster assistance check here 17. Definition of the condition engage in a prior year in any of the acts distributed income (tens 64 and 6e, Part XIII) for tax year(5) beginning the fore y | | Website address ► N/A | | | | |
| Located at N 250 WAVERLY AVE., NEWTON, MA It Section 4947(a)(1) nonexempt charable trusts filing form 990-PF in leu of Form 1041 - Chack hare and offer the amount of lax-exempt interest recover 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, scuritise, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form 10 F 90-22.1. If "Yes," enter the name of the foreign country? 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 from is checked in the "Yes" column, unless an exception applies. 1 During the year of 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, land money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish poods, services, or facilities to (or accept them from) a disqualified person? (4) Pey compensation it, or hay or reimburs the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of enther available for the benefit or use of a disqualified person (or make any of enther available for the period of | 14 | | (617)3 | 32- | 038 | 4 |
| 15 Section 4947(a)(1) nonexempt charitable trusts fling Form 990-PF in Iteu 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 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. 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. 10 During the year did the foundation (either directly or indirectly); (11) 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 remittives 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 girant to or to employ the official for a period after termination of government service, if terminating within 90 days.) b If any answer is "See" to 11(1)-60, did any of the actis fail to qualify under the exceptions described in Regulations section 33.4941(d)-3 or in 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? If "Yes, list the years Yes X No Yes X | | | ZIP+4 ▶02 | 458 | | |
| Ves No securities, or other financial account in a foreign country? 16 X X | 15 | | | | • | |
| 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 old 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, land 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 oil, 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 ferrimutation of government service, if terminating within 90 days.) 1b 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)? 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(n)(3) or 4942(li(3)): a At the end of tax year? 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(a)(2) realing to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying | | and enter the amount of tax-exempt interest received or accrued during the year | 15 | N | /A | |
| 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 it 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 this 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 grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) 1b If any answer is "Yes" to 14(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)? 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(n)(3) or 4942(l)(3): 1 If "Yes," list the years > | 16 | At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, | | | Yes | No |
| 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. 10 During the year did the foundation (either directly or indirectly): 11 Engage in the sale or exchange, or leasing of property with a disqualified person? 12 Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? 13 Furnish goods, services, or facilities to (or accept them from) a disqualified person? 14 Pay compensation to, or pay or reimburse the expenses of, a disqualified person? 15 Transfer any income or assets to a disqualified person or yes \times No 16 Transfer any income or assets to a disqualified person or yes \times No 16 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 Transfer any income or assets to a disqualified person or make any of efficial for a period after termination of government service, it terminating within 90 days.) 16 If any answer is Yes' to 1a(1)-{6}, did any of the acts fall to qualify under the exceptions described in Regulations section 53.4941(a)-3 or in a current notice regarding disaster assistance check here 10 Unit the foundation engage in a pror 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 an 2011? 12 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)(2) and applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assess) to the year's undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? 16 If the provisions of section 4942(a)(2) are being applied to any of the year's li | | | | 16 | 1 | X |
| Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 If any item is checked in the "Yes" column, unless an exception applies. 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 povernment 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.) 1) If any answer is Yes's to 1a(1)-(6), did any of the acits fall to qualify under the exceptions described in Regulations section 53-A94(16)-3 or in a current notice regarding disaster assistance (see instructions)? 1) Organizations relying on a current notice regarding disaster assistance (see instructions)? 1) Taxes on falture to distribute moome (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(i)(3) or 4942(i)(5)): 2) 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? 2) Taxes on falture to distribute moome (section 4942) (does 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.) 1) If yes,' all the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, | | | | | | |
| 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): 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 for make any of either available for the benefit or use of a disqualified person for 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 operemment 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 53.491 (igh 3 or in a current notice regarding disaster assistance (see instructions)? 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 53.491 (igh 3 or in a current notice regarding disaster assistance check here b Diff 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 as a result of (1) applying section 4942(a)(2) (reliating to undation defined in section 4942(a)(3) or 4942(a)(3) or 4942(a)(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(5) beginning before 2011? If Yes, list the years is lead in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (reliating to incorrect valuation of ass | | | | 1 | I | |
| 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 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 Ta(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(n)-3 or in a current notice reparding disaster assistance check here c Did the foundation engage in a prior year in any of the acts described in Ta, other than excepted acts, that were not corrected before the first day of the tax year beginning of 9492 (does not apply for years the foundation was a private operating foundation defined in section 4942(n)(3) or 4942(n)(5)): a At the end of tax year 2011, did the foundation have any undistributed income (times 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If 'Yes,' list the years \business holdings in 2011 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1965; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4942(a)(7) to dispose of holdings acquired by grift 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 as a result of (1) any purchase by the foundation or disqualified persons | Pa | rt VII-B Statements Regarding Activities for Which Form 4720 May Be Required | | | | |
| (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 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 reimburse the expenses of, a disqualified person? (5) Transetr 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 53-441(0)-3 or in a current notice regarding disaster assistance (see instructions)? N/A 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(0)(3) or 4942(0)(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 A the tend of tax year 2011, did 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.) A the ther of tax year 2011, did the foundation is not applying the provisions of section 4943(a)(7) in a display of the year's undistributed income? (If | | File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. | | | Yes | 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 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 reimburse the expenses of, a disqualified person? (5) Transetr 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 53-441(0)-3 or in a current notice regarding disaster assistance (see instructions)? N/A 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(0)(3) or 4942(0)(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 A the tend of tax year 2011, did 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.) A the ther of tax year 2011, did the foundation is not applying the provisions of section 4943(a)(7) in a display of the year's undistributed income? (If | 1a | During the year did the foundation (either directly or indirectly): | | | | |
| a disqualified person? Yes No | | | X No | | | |
| (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available 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)? Crigonizations relying on a current notice regarding disaster assistance (see instructions)? 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? b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (if applying section 4942(a)(2) to all years listed, answer 'No' and attach N/A b If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. In the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. In the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. In the provisions of section 4942(a)(2) are b | | (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) | | | | |
| (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 reparding disaster assistance (see instructions)? C Draid 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? b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach N/A b If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, test the years here. A Da Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? A Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? A Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time | | a disqualified person? | X No | | | |
| (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes X No | | (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? | X No | | | |
| (5) Transfer any income or assets to 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 53.491(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Takes 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 Isted 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 If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. Ag Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Ag Did the vexcess 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.) 4b Did the foundation inwest during the year any amount in a manner that would jeoparduze i | | | | | | |
| 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 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.) If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. About the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Yes \[\infty \) 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 | | | | | | |
| 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.) If 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)? In A Organizations relying on a current notice regarding disaster assistance check here organizations relying on a current notice regarding disaster assistance (see instructions)? In A Organizations relying on a current notice regarding disaster assistance (see instructions). In A It Is X It Is X It Is X It is is the verification of the tax year beginning in 2011? In Yes (X) No If Yes, is is the years beginning before 2011? In Yes, is is the years beginning before 2011? In Yes, is is the years beginning before 2011? In Yes, is is the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) In Yes In Yes No If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. In Yes In Yes No If Yes, if the theorem of the distributed persons after may 26, 1969; (2) the layse 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 layse 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.) In Yes In Yes No It Is the provisions of section 4943(c)(7) to dispose of holdings acquired by gift or bequest; or (3) the layse of the 10-, | | | X No | | | |
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| If "Yes," list the years \ | 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 | | | | |
| 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. | | before 2011? | X No | | | |
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| 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 | | | | | |
| c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. | | valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach | | 1 | | |
| 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? 4a X b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011? 4b X | | statement - see instructions.) | N/A | 2b_ | | |
| 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? 4a X b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011? 4b X | C | If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. | | | | |
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| 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? 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 | | during the year? | : X No | | |] |
| 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? 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 | þ | If "Yes," did it have excess business holdings in 2011 as a result of (1) any purchase by the foundation or disqualified persons after | r | | | |
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| 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a X b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011? 4b X | | | N/A | 3b | | _ |
| 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 | 4a | • | • | | | X |
| had not been removed from jeopardy before the first day of the tax year beginning in 2011? 4b X | | | that | | | |
| | | | | 4b | <u> </u> | X |
| | _ | | For | m 99 0 | -PF | (2011) |

12-02-11

| Dort VI B Statements Deporting Activities for Misich E | | | 36-2/445 | 43 | Page 6 |
|--|--|-----------------------------|--|--|--------------------------|
| Part VII-B Statements Regarding Activities for Which F | orm 4/20 May Be F | sequired (contin | ued) | | |
| 5a During the year did the foundation pay or incur any amount to: | | , | | 1 | |
| (1) Carry on propaganda, or otherwise attempt to influence legislation (section | , ,, | | s X No | | |
| (2) Influence the outcome of any specific public election (see section 4955); o | r to carry on, directly or indire | | 1 | | |
| any voter registration drive? | | s X No | | | |
| (3) Provide a grant to an individual for travel, study, or other similar purposes | | Ye | s X No | | |
| (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)? | | | s X No | | |
| (5) Provide for any purpose other than religious, charitable, scientific, literary, | or educational purposes, or f | | | | |
| the prevention of cruelty to children or animals? | | Ye | s X No | | |
| b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify unc | ler the exceptions described i | n Regulations | | - | |
| section 53.4945 or in a current notice regarding disaster assistance (see instru | ctions)? | | N/A | 5b | |
| Organizations relying on a current notice regarding disaster assistance check h | еге | | | | |
| c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fr | om the tax because it mainta | | | | 1 |
| expenditure responsibility for the grant? | N | I/A 🔲 Ye | s No | | - |
| 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 | | | | 1 |
| a personal benefit contract? | | Ye | s X No | | ł |
| b Did the foundation, during the year, pay premiums, directly or indirectly, on a p | ersonal benefit contract? | | Ĺ | 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 | s X No | | |
| b If "Yes," did the foundation receive any proceeds or have any net income attribu | itable to the transaction? | | N/A | 7b | |
| Part VIII Information About Officers, Directors, Trust Paid Employees, and Contractors | ees, Foundation Ma | nagers, Highly | <i>'</i> | | |
| List all officers, directors, trustees, foundation managers and their | compensation. | | | | |
| | (b) Title, and average | (c) Compensation | (d) Contributions to employee benefit plans and deferred | (e) | Expense ount, other |
| (a) Name and address | hours per week devoted to position | (If not paid, enter -0-) | and deferred compensation | acc | ount, other lowances |
| BERNEDA MEEKS | DIRECTOR | | | 1 | |
| 260 WAVERLY AVE. | | | | | |
| VEWTON, MA 02458 | 20.00 | 0. | 0. | | 0. |
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| Compensation of five highest-paid employees (other than those inc | luded on line 1). If none, | enter "NONE." | | | |
| | (b) Title, and average | | (d) Contributions to employee benefit plans and deferred | (e |) Expense ount, other |
| (a) Name and address of each employee paid more than \$50,000 | hours per week devoted to position | (c) Compensation | and deferred compensation | acc | ount, other lowances |
| NONE | and to position | | Jonipanouson. | | |
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| | - | | | | |
| otal number of other employees hald over \$50 000 | 1 | <u> </u> | · | | 0 |
| | | | | | |

| Form 990-PF (2011) JOSEPH F. & EDNA SLAVIK FOUNDATION | 38- | 2744923 Page 7 |
|--|---------------------|------------------|
| Part VIII Information About Officers, Directors, Trustees, Foundation No. Paid Employees, and Contractors (continued) | lanagers, Highly | |
| 3 Five highest-paid independent contractors for professional services. If none, enter "NONI | ." | |
| (a) Name and address of each person paid more than \$50,000 | (b) Type of service | (c) Compensation |
| NONE | | |
| | ······ | |
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| | | |
| Total number of others receiving over \$50,000 for professional services Part IX-A Summary of Direct Charitable Activities | | <u> </u> |
| List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical info | | Expenses |
| number of organizations and other beneficiaries served, conferences convened, research papers produced, et | C | |
| 1 <u>N/A</u> | | |
| | | |
| 2 | | |
| | | |
| 3 | | |
| | | |
| 4 | | |
| | | |
| Dod IV D. C. | | |
| Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 a | nd 2. | Amount |
| 1 N/A | | |
| | | 1 |
| 0 | | |
| 2 | | |
| | | |
| All other program-related investments. See instructions. | | |
| 3 | | |
| | | |
| Total. Add lines 1 through 3 | <u> </u> | 0. |

| P | art.X Minimum Investment Return (All domestic foundations must complete this part. Foreign four | idations, se | e 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 | 833,180. |
| b | Average of monthly cash balances | 1b | 11,220. |
| C | Fair market value of all other assets | 1c | |
| d | Total (add lines 1a, b, and c) | 1d | 844,400. |
| е | Reduction claimed for blockage or other factors reported on lines 1a and | | |
| | 1c (attach detailed explanation) 1e 0. | | |
| 2 | Acquisition indebtedness applicable to line 1 assets | 2 | 0. |
| 3 | Subtract line 2 from line 1d | 3 | 844,400. |
| 4 | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) | 4 | 12,666. |
| 5 | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5 | 831,734. |
| 6 | Minimum investment return, Enter 5% of line 5 | 6 | 41,587. |
| Р | art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and foreign organizations check here and do not complete this part.) | d certain | |
| 1 | Minimum investment return from Part X, line 6 | 1 | 41,587. |
| 2a | Tax on investment income for 2011 from Part VI, line 5 | | |
| b | Income tax for 2011. (This does not include the tax from Part VI.) | | |
| C | Add lines 2a and 2b | 2c | 430. |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 | 3 | 41,157. |
| 4 | Recoveries of amounts treated as qualifying distributions | 4 | 0. |
| 5 | Add lines 3 and 4 | 5 | 41,157. |
| 6 | Deduction from distributable amount (see instructions) | 6 | 0. |
| 7 | Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 | 7 | 41,157. |
| <u> </u> | art XII Qualifying Distributions (see instructions) | | |
| 1 | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: | | |
| a | | 1a | 77,075. |
| þ | Program-related investments - total from Part IX-B | 1b | 0. |
| 2 | Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes | 2 | |
| 3 | Amounts set aside for specific charitable projects that satisfy the: | | |
| 8 | | 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 | 77,075. |
| 5 | Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment | | |
| | income. Enter 1% of Part I, line 27b | 5 | 430. |
| 6 | Adjusted qualifying distributions. Subtract line 5 from line 4 | 6 | 76,645. |
| | Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation (4940(e) reduction of tax in those years. | qualifies for th | ne section |

Form **990-PF** (2011)

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 | | | | 41,157. |
| 2 Undistributed income, if any, as of the end of 2011 | | · · · · · · · · · · · · · · · · · · · | | |
| a Enter amount for 2010 only | | | 0. | |
| ь Total for prior years: | | | | |
| 3 Excess distributions carryover, if any, to 2011: | | 0. | | |
| | | | | |
| a From 2006 33,545. | | | | |
| b From 2007 54,101. | | | | |
| g From 2008 50,347. d From 2009 6.504. | , | | | |
| d From 2009 6,504. e From 2010 34,483. | | | | |
| | 170 000 | | | |
| f Total of lines 3a through e | 178,980. | | | |
| 4 Qualifying distributions for 2011 from | İ | | | |
| Part XII, line 4: ► \$ 77,075. | | | | |
| 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 | 0 | | | |
| (Election required - see instructions) | 0. | | | 44 455 |
| d Applied to 2011 distributable amount | 25 010 | | | 41,157. |
| e Remaining amount distributed out of corpus | 35,918. | | | |
| 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: | | | | |
| 2 Corpus Add lines 3f, 4c, and 4e Subtract line 5 | 214,898. | | ļ | |
| b Prior years' undistributed income. Subtract | | | | |
| line 4b from line 2b | | 0. | | |
| c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed | | 0. | | |
| d Subtract line 6c from line 6b. Taxable | | | | |
| amount - see instructions | | 0. | | |
| e Undistributed income for 2010. Subtract line | | | | |
| 4a from line 2a. Taxable amount - see instr. | | | 0. | |
| f Undistributed income for 2011. Subtract | | | | |
| lines 4d and 5 from line 1. This amount must | | | | |
| be distributed in 2012 | | | | |
| 7 Amounts treated as distributions out of | | | | |
| corpus to satisfy requirements imposed by | | | | |
| section 170(b)(1)(F) or 4942(g)(3) | 0. | | | |
| 8 Excess distributions carryover from 2006 | | | | |
| not applied on line 5 or line 7 | 33,545. | | | |
| 9 Excess distributions carryover to 2012 | | | | |
| Subtract lines 7 and 8 from line 6a | 181,353. | | | |
| 0 Analysis of line 9 | | | | |
| a Excess from 2007 54,101. | | | | |
| b Excess from 2008 50, 347. | | | | |
| c Excess from 2009 6,504. | | | | |
| d Excess from 2010 34, 483. | | | | |
| e Excess from 2011 35,918. | | | | |
| | | · | | Form 000-DE (2011) |

| | F. & EDNA S | | | 38-27 | 744923 Page 10 |
|---|-----------------------------|-----------------------------|-----------------------------|-----------------------------|--------------------|
| Part XIV Private Operating F | oundations (see in | structions and Part V | II-A, question 9) | N/A | |
| 1 a If the foundation has received a ruling of | or determination letter tha | t it is a private operating | | | |
| foundation, and the ruling is effective fo | or 2011, enter the date of | the ruling | ▶ | | |
| b Check box to indicate whether the foun | | ng foundation described | | 4942(j)(3) or4 | 942(j)(5) |
| 2 a Enter the lesser of the adjusted net | Tax year | | Prior 3 years | | - , , <u>-</u> , , |
| income from Part I or the minimum | (a) 2011 | (b) 2010 | (c) 2009 | (d) 2008 | (e) Total |
| investment return from Part X for | | | | | |
| each year listed | | | | | |
| b 85% of line 2a | | | | | |
| c Qualifying distributions from Part XII, | | | | | |
| line 4 for each year listed | | | | | |
| d Amounts included in line 2c not | | | | | |
| used directly for active conduct of | | | | | |
| exempt activities | | | | | |
| e Qualifying distributions made directly | | | | | |
| for active conduct of exempt activities. | | | | | |
| Subtract line 2d from line 2c Complete 3a, b, or c for the alternative test relied upon: a "Assets" alternative test - enter: | | | | | |
| (1) Value of all assets (2) Value of assets qualifying under section 4942(j)(3)(B)(i) | | | | | |
| b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed | | | | | |
| c "Support" alternative test - enter: | | | | | |
| (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) | | | | | |
| (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) | | | | | |
| (3) Largest amount of support from | | | | | |
| an exempt organization | ł | | | | |
| (4) Gross investment income | | | | | |
| Part XV Supplementary Info | | | if the foundation | n had \$5,000 or m | ore in assets |
| at any time during | the year-see inst | tructions.) | | | |
| Information Regarding Foundation a List any managers of the foundation we year (but only if they have contributed NONE | ho have contributed more | | ntributions received by th | ne foundation before the cl | ose of any tax |
| b List any managers of the foundation w other entity) of which the foundation h | | | n (or an equally large por | tion of the ownership of a | partnership or |
| NONE | | | | | |
| 2 Information Regarding Contribu Check here ► X if the foundation the foundation makes gifts, grants, etc | only makes contributions | s to preselected charitabl | e organizations and does | | |
| a The name, address, and telephone nur | nber of the person to who | om applications should b | e addressed: | | |
| b The form in which applications should | be submitted and inform | ation and materials they | should include. | | |
| c Any submission deadlines: | | | | | |
| d Any restrictions or limitations on awar | ds, such as by geographi | cal areas, charitable field | s, kınds of institutions, o | or other factors: | |
| | | | | | |

Part XV Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, show any relationship to any foundation manager or substantial contributor Recipient Purpose of grant or contribution Foundation Amount status of Name and address (home or business) recipient a Paid during the year VARIOUS (SEE STATEMENT B) N/A PUBLIC CHARITABLE 77,075. Total ► 3a 77,075. b Approved for future payment NONE **▶** 3b Total

Part XVI-A **Analysis of Income-Producing Activities**

| | Unrelated t | | Excluded | | (e) |
|--|-------------------------|--------------------------|--|---------------|-----------------------------------|
| Program service revenue: | (a) Business code | (b) Amount | (C) Exclu- sion code | (d) Amount | Related or exempt function income |
| | 1 1 | | | | |
| | | | | | |
| | | | +-,+- | | |
| | | | | | |
| | | | + | + | |
| Fees and contracts from government agencies | - | | | | |
| lembership dues and assessments | | | | - | |
| iterest on savings and temporary cash | | | 1 | | |
| vestments | | | | | |
| ividends and interest from securities | | | 14 | 25,113. | |
| et rental income or (loss) from real estate: | | | | | |
| Debt-financed property | | | ļ_ | | |
| Not debt-financed property | | | | | |
| et rental income or (loss) from personal | | | 1 | <u> </u> | |
| operty | <u> </u> | | | | |
| ther investment income | <u> </u> | | | | |
| ain or (loss) from sales of assets other | | | 1 4 | 22 520 | |
| nan inventory et income or (loss) from special events | | | 14 | 23,528. | |
| ross profit or (loss) from sales of inventory | | | | | |
| ther revenue: | | | | | |
| | | | | | |
| | | | | | |
| | | | | | , |
| | | | | | |
| · | | | | | · |
| Subtotal. Add columns (b), (d), and (e) | | 0. | <u>.ll</u> | 48,641. | |
| otal. Add line 12, columns (b), (d), and (e) worksheet in line 13 instructions to verify calculations. | | | | 13 | 48,64 |
| Relationship of Activities No. Explain below how each activity for which in | come is reported in | column (e) of Part XVI-A | | | olishment of |
| the foundation's exempt purposes (other th | | | | | |
| the foundation's exempt purposes (other th | | | | | |
| the foundation's exempt purposes (other th | | | | | |
| the foundation's exempt purposes (other th | | | | | |
| the foundation's exempt purposes (other th | | | | | |
| the foundation's exempt purposes (other th | | | | | |
| the foundation's exempt purposes (other th | | | | | |

| Part X | | | To and Transactions at | nd Relationships With Nonch | aritable | | ige 13 |
|----------------|--|----------------------------------|--|---|----------------|----------|--------|
| | Exempt Organ | • | TO GIVE TRAINCHOLIONIS GI | The Helationompo With Honor | idi ilabic | • | |
| 1 Did 1 | | | ollowing with any other organization | n described in section 501(c) of | | Yes | No |
| | | | tion 527, relating to political organi | | | | |
| a Tran | sfers from the reporting founda | ation to a noncharitable exer | mpt organization of: | | | | |
| (1) | Cash , | | | | 1a(1) | | X |
| (2) | Other assets | | | | 1a(2) | | X |
| b Othe | r transactions: | | | | | | ١ |
| (1) | Sales of assets to a noncharital | ble exempt organization | | | 1b(1) | | X |
| (2) | Purchases of assets from a no | ncharitable exempt organiza | ition | | 1b(2) | | X |
| (3) | Rental of facilities, equipment, | or other assets | | | 1b(3) | | X |
| (4) | Reimbursement arrangements | | | | 1b(4) | | X |
| (5) | Loans or loan guarantees | | | | 1b(5) | | X |
| • • | Performance of services or me | · | | | 1b(6) | | X |
| | ing of facilities, equipment, ma | | | | 1c | L | X |
| | • | | · · | rays show the fair market value of the good | | ets, | |
| | | | | e in any transaction or sharing arrangemen | t, show in | | |
| | mn (d) the value of the goods, | , | | 1.40 | | | |
| (a) Line no | (b) Amount involved | | aritable exempt organization | (d) Description of transfers, transactions, a | nd sharing an | rangeme | ents |
| | | <u> </u> | / <u>A</u> | | | | |
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| | | | | | | | |
| 2a Is th | e foundation directly or indirec | tly affiliated with, or related | to, one or more tax-exempt organiz | ations described | | | _ |
| ın se | ection 501(c) of the Code (other | r than section 501(c)(3)) or | ın section 527? | | Yes | X | No |
| b If "Y | es," complete the following sch | | | | | | |
| | (a) Name of org | <u>janization</u> | (b) Type of organization | (c) Description of relation | nship | | |
| | N/A | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | Under population of parties 1 declare | that I have everyned this arturn | | personness and to the beat of the break of the second | | | _ |
| Sian | | | | statements, and to the best of my knowledge ation of which preparer has any knowledge | May the IRS | | |
| Sign Here | ► /Slred | L Mes | 1 1/12/12 | - lis | shown below | (see ins | str)? |
| | Signature of officer or trustee | | Date | Title | X Yes | | _J No |
| | Print/Type preparer's na | | arer's signature | Date / Check If PT | IN | | |
| | , imp type properties and | | (1/1/2) | self- employed | | | |
| Paid | KENNETH R. | PERI.TAI | THE TOTAL ! | 01202 | 01029 | 125 | |
| Prepa | | | N RERLIN, P.C. | Firm's EIN ▶ 38- | | | |
| Use C | | .501114111 110119 | 11 | Timis Em P 30 | 2000 | J = | |
| | · | 913 NORTHWES | TERN HWY., SUIT | E 510 | | | |
| | | OUTHFIELD, MI | | | <u> -356 -</u> | 388 | 10 |

Form **990-PF** (2011)

| SOURCE GROSS AMOUNT DIVIDENDS COLUMN (A) AMOUNT | FORM 990-PF DIV | IDENDS AND | INTER | EST FROM | SECUE | RITIES | STATEMENT | 1 |
|--|--------------------------|-------------|--------|---------------|-------|---------------|-------------|------|
| TOTAL TO FM 990-PF, PART I, LN 4 33,263. 8,150. 25,11 FORM 990-PF ACCOUNTING FEES STATEMENT (A) (B) (C) (D) EXPENSES NET INVEST- ADJUSTED CHARITAE PER BOOKS MENT INCOME NET INCOME PURPOSE ACCOUNTING FEES 1,575. 0. 0. 0. TO FORM 990-PF, PG 1, LN 16B 1,575. 0. 0. 0. FORM 990-PF TAXES STATEMENT (A) (B) (C) (D) EXPENSES NET INVEST- ADJUSTED CHARITAE NET INCOME PURPOSE MENT INCOME NET INCOME PURPOSE EXCISE TAX 1,245. 0. 0. 0. TO FORM 990-PF, PG 1, LN 18 1,497. 0. 0. 0. FORM 990-PF OTHER EXPENSES STATEMENT (A) (B) (C) (D) CHARITAE PURPOSE NET INVEST- ADJUSTED CHARITAE NET INCOME PURPOSE NET INVEST- ADJUSTED CHARITAE NET INCOME NET INCOME PURPOSE NET INVEST- ADJUSTED CHARITAE NET INCOME NET INCOME PURPOSE NET INVEST- ADJUSTED CHARITAE PURPOSE NET INVES | SOURCE , ' | | GROSS | AMOUNT | | | • | A) |
| Ca | FIDELITY BROKERAGE SERVI | CES LLC | | 33,263. | | 8,150. | 25,1 | 113. |
| Ca | TOTAL TO FM 990-PF, PART | I, LN 4 | | 33,263. | | 8,150. | 25,1 | L13. |
| EXPENSES NET INVEST- ADJUSTED CHARITAE PER BOOKS MENT INCOME NET INCOME PURPOSE | FORM 990-PF |)A | COUNTI | NG FEES | | | STATEMENT | . 2 |
| TO FORM 990-PF, PG 1, LN 16B 1,575. 0. 0. 0. FORM 990-PF TAXES STATEMENT (A) (B) (C) (D) CHARITAE PER BOOKS MENT INCOME NET INCOME PURPOSE NET TO FORM 990-PF, PG 1, LN 18 1,497. 0. 0. 0. FORM 990-PF OTHER EXPENSES STATEMENT (A) (B) (C) (D) CHARITAE PURPOSE NET INCOME PURPOSE NET INCOME NET INCOME PURPOSE STATEMENT (A) (B) (C) (D) (D) CHARITAE PER BOOKS MENT INCOME NET INCOME PURPOSE PER BOOKS MENT INCOME NET INCOME PURPOSE PURPOSE NET INCOME NET INCOME PURPOSE PURPOSE NET INCOME PURPOSE PURPOSE NET INCOME NET INCOME PURPOSE PURPOSE NET INCOME PURPOSE PURPOSE NET INCOME NET INCOME PURPOSE PURPOSE NET INCOME NET INCOME PURPOSE NET INCOME PURPOSE PURPOSE NET INCOME PURPOSE NET INCOME PURPOSE NET INCOME NET INCOME PURPOSE NET INCOME NET INCOME PURPOSE NET INCOME | DESCRIPTION | EXPE | ENSES | NET INV | | ADJUSTED | CHARITA | |
| FORM 990-PF TAXES STATEMENT (A) EXPENSES NET INVEST- PER BOOKS MENT INCOME NET INCOME PURPOSE FOREIGN TAXES EXCISE TAX 1,245. 0. 0. TO FORM 990-PF, PG 1, LN 18 1,497. OTHER EXPENSES OTHER EXPENSES STATEMENT (A) EXPENSES OTHER EXPENSES STATEMENT (A) EXPENSES DESCRIPTION EXPENSES NET INVEST- ADJUSTED CHARITAL PER BOOKS MENT INCOME PURPOSE BANK SERVICE CHARGES - TRUST 5,667. 5,667. O. | ACCOUNTING FEES | | 1,575. | - | 0. | | 0. | 0. |
| (A) (B) (C) (D) | TO FORM 990-PF, PG 1, LN | 16B | 1,575. | | 0. | | 0. | 0. |
| DESCRIPTION EXPENSES NET INVEST- ADJUSTED PURPOSE FOREIGN TAXES EXCISE TAX 1,245. TO FORM 990-PF, PG 1, LN 18 CAN BE STATEMENT (A) EXPENSES NET INVEST- ADJUSTED EXPENSES STATEMENT (A) EXPENSES NET INVEST- ADJUSTED CHARITAN (B) EXPENSES NET INVEST- ADJUSTED CHARITAN CHARITAN (C) EXPENSES NET INVEST- ADJUSTED CHARITAN PER BOOKS MENT INCOME BANK SERVICE CHARGES - TRUST 5,667. 5,667. O. | FORM 990-PF | | TAX | ES | | · | STATEMENT | 3 |
| ### TO FORM 990-PF, PG 1, LN 18 | DESCRIPTION | EXPE | ENSES | NET INV | | ADJUSTED | CHARIT | |
| TO FORM 990-PF, PG 1, LN 18 1,497. 0. 0. THER EXPENSES STATEMENT (A) (B) (C) (D) (D) (EXPENSES NET INVEST- ADJUSTED CHARITAE PER BOOKS MENT INCOME NET INCOME PURPOSE BANK SERVICE CHARGES - TRUST 5,667. 5,667. 0. | | | | | | | | 0. |
| FORM 990-PF OTHER EXPENSES (A) EXPENSES OTHER EXPENSES (B) EXPENSES OTHER EXPENSES (C) ADJUSTED CHARITAE PER BOOKS MENT INCOME PURPOSE BANK SERVICE CHARGES - TRUST 5,667. 5,667. 0. | | | | · | | | | 0. |
| DESCRIPTION CA (B) (C) (D) | TO FORM 990-PF, PG 1, LN | 18 ===== | 1,497. | : | 0. | | | 0. |
| DESCRIPTION EXPENSES NET INVEST- ADJUSTED CHARITAE PER BOOKS MENT INCOME NET INCOME PURPOSE 5,667. 5,667. 0. | FORM 990-PF | (| THER E | XPENSES | | | STATEMENT | 4 |
| | DESCRIPTION | EXP | ENSES | NET INV | EST- | ADJUSTED | CHARIT | |
| TO FORM 990-PF, PG 1, LN 23 5,667. 5,667. 0. | BANK SERVICE CHARGES - T | RUST | 5,667. | 5 | ,667. | | 0. | 0. |
| | TO FORM 990-PF, PG 1, LN | 23 | 5,667. | 5 | ,667. | | 0. | 0. |

| FORM 990-PF CORPORATE STOCK | | STATEMENT 5 |
|---|------------|----------------------|
| DESCRIPTION . | BOOK VALUE | FAIR MARKET VALUE |
| FIDELITY INVESTMENTS | 413,586. | 422,096. |
| TOTAL TO FORM 990-PF, PART II, LINE 10B | 413,586. | 422,096. |
| FORM 990-PF CORPORATE BONDS | | STATEMENT 6 |
| DESCRIPTION | BOOK VALUE | FAIR MARKET VALUE |
| FIDELITY INVESTMENTS | 367,451. | 370,354. |
| TOTAL TO FORM 990-PF, PART II, LINE 10C | 367,451. | 370,354. |

J & E Slavik Foundation 2011 recap

1.D. # 38-2744923

| 2seeds | |
|---|-----------|
| P.O. Box 3196 | |
| Washington DC 20010 | \$ 15,000 |
| Amoratan Can | |
| American Cancer society | |
| 20450 Civic Center Dr | |
| Southfield, Mi. 48076 | \$ 500 |
| Boston Preparatory School | |
| 1286 Hyde Park Ave | |
| Hyde Park, Ma. 02136 | \$ 1,000 |
| Boston Public Library | |
| 700 Boylston | |
| Boston, Ma. 02116 | \$ 1,500 |
| | 7 1,300 |
| Boys & Girls Club of Boston | |
| 50 Congress St #730 | |
| Boston, Ma. 02109 | \$ 5,000 |
| Church of the Redeemer | |
| 379 Hammond St | |
| Chestnut Hill, Ma. 02467 | \$ 11,000 |
| Citi Conton Doufermine Aut. | · |
| Citi Center Performing Arts 270 Tremont St. | |
| | |
| Boston, Ma. 02116 | \$ 5,000 |
| Conservatory Lab Charter School | |
| 25 Arlington St | |
| Brighton, Ma. 02140 | \$ 1,000 |
| Emerald Necklace Conservancy | |
| 125 The Fenway | |
| Boston, Ma. 02115 | ć roc |
| | \$ 500 |

1.0. # 38-2744923

| Farm Institute | |
|--------------------------------|-------------|
| P.O. Box 1868 | |
| Edgartown, Mą. 02539 | \$ 675 |
| French Library Cultural Center | |
| 53 Marlborough Street | |
| Boston, Ma. 02116 | \$ 1,000 |
| Huntington Theater | |
| 264 Huntington Ave | |
| Boston, Ma. 02115 | \$ 1,600 |
| Landmark Orchestra | |
| 168 Brattle | |
| Cambridge, Ma. 02138 | \$ 5,500 |
| Phillips Collection Art Museum | |
| 1600 21 st St. NW | |
| Washington DC 20009 | \$ 10,000 |
| Susan Komen 3 Day Walk | |
| 205 N. Michigan Ave Ste. 2630 | |
| Chicago, II. 60601 | \$ 500 |
| Urban Improv | |
| 8 St. John St. | |
| Jamaica Plain, Ma. 02130 | \$ 1,000 |
| Walnut Hill School | |
| 12 Highland St | |
| Natick, Ma. 01760 | \$ 1,000 |
| Warburg Courage Curriculum | |
| 263 Huntington Ave Ste. 366 | |
| Boston, Ma. 02115 | \$ 15,000 |
| Women's lunch place | |
| P.O. Box 170900 | |
| Boston, Ma. 02117 | \$ 300 |
| TOTAL DISTRIBUTIONS | \$ 77,075 |
| | # ¬¬¬, U 1) |