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

2011

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

For calendar year 2011 or tax year beginning JUL 1, 2011, and ending JUN 30, 2012

Name of foundation THE JULIA & SEYMOUR GROSS FOUNDATION, INC.		A Employer identification number 13-6122092
Number and street (or P.O. box number if mail is not delivered to street address) P.O. BOX 506	Room/suite	B Telephone number 781-237-2544
City or town, state, and ZIP code WESTON, MA 02493-0003		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 5,401,376. (Part I, column (d) must be on cash basis.)	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments		12,610.	12,610.		STATEMENT 1
4 Dividends and interest from securities		106,283.	106,283.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		91,503.			
b Gross sales price for all assets on line 6a 639,906.					
7 Capital gain net income (from Part IV, line 2)			91,503.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11		210,396.	210,396.		
13 Compensation of officers, directors, trustees, etc		38,500.	11,550.		26,950.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees STMT 3		3,326.	0.		3,326.
b Accounting fees STMT 4		15,864.	0.		15,864.
c Other professional fees STMT 5		27,178.	27,178.		0.
17 Interest					
18 Taxes STMT 6		5,475.	475.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings		177.	0.		177.
22 Printing and publications					
23 Other expenses STMT 7		4,809.	232.		4,577.
24 Total operating and administrative expenses. Add lines 13 through 23		95,329.	39,435.		50,894.
25 Contributions, gifts, grants paid		359,769.			359,769.
26 Total expenses and disbursements. Add lines 24 and 25		455,098.	39,435.		410,663.
27 Subtract line 26 from line 12		<244,702.>			
a Excess of revenue over expenses and disbursements					
b Net investment income (if negative, enter -0-)			170,961.		
c Adjusted net income (if negative, enter -0-)				N/A	

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only

	Beginning of year (a) Book Value	End of year	
		(b) Book Value	(c) Fair Market Value
Assets			
1 Cash - non-interest-bearing			
2 Savings and temporary cash investments	1,370,854.	1,074,279.	1,074,279.
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 ▶			
8 Inventories for sale or use			
9 Prepaid expenses and deferred charges			
10a Investments - U S and state government obligations STMT 8	71,545.	58,186.	64,697.
b Investments - corporate stock STMT 9	3,581,585.	3,646,817.	4,262,400.
c Investments - corporate bonds			
11 Investments - land, buildings, and equipment basis ▶			
Less accumulated depreciation ▶			
12 Investments - mortgage loans			
13 Investments - other			
14 Land, buildings, and equipment basis ▶			
Less accumulated depreciation ▶			
15 Other assets (describe ▶)			
16 Total assets (to be completed by all filers)	5,023,984.	4,779,282.	5,401,376.
Liabilities			
17 Accounts payable and accrued expenses			
18 Grants payable			
19 Deferred revenue			
20 Loans from officers, directors, trustees, and other disqualified persons			
21 Mortgages and other notes payable			
22 Other liabilities (describe ▶)			
23 Total liabilities (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances			
Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> X			
and complete lines 24 through 26 and lines 30 and 31.			
24 Unrestricted	5,023,984.	4,779,282.	
25 Temporarily restricted			
26 Permanently restricted			
Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/>			
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	5,023,984.	4,779,282.	
31 Total liabilities and net assets/fund balances	5,023,984.	4,779,282.	

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	5,023,984.
2 Enter amount from Part I, line 27a	2	<244,702.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	4,779,282.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	4,779,282.

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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 SEE ATTACHMENT A			P	VARIOUS	VARIOUS
b					
c					
d					
e					

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 639,906.		548,403.	91,503.
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col. (k), but not less than -0-) or Losses (from col (h))
a			91,503.
b			
c			
d			
e			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	91,503.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6). If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8	3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2010	227,552.	5,249,652.	.043346
2009	207,639.	4,862,913.	.042698
2008	386,698.	5,894,382.	.065605
2007	344,452.	5,729,532.	.060119
2006	281,944.	6,040,617.	.046675

2 Total of line 1, column (d)	2	.258443
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.051689
4 Enter the net value of noncharitable-use assets for 2011 from Part X, line 5	4	5,350,827.
5 Multiply line 4 by line 3	5	276,579.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,710.
7 Add lines 5 and 6	7	278,289.
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. See the Part VI instructions	8	410,663.

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)		1	1,710.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		3	1,710.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
3 Add lines 1 and 2		5	1,710.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		6a	6,996.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		6b	
6 Credits/Payments:		6c	
a 2011 estimated tax payments and 2010 overpayment credited to 2011		6d	
b Exempt foreign organizations - tax withheld at source		7	6,996.
c Tax paid with application for extension of time to file (Form 8868)		8	
d Backup withholding erroneously withheld		9	
7 Total credits and payments. Add lines 6a through 6d		10	5,286.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached		11	0.
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
11 Enter the amount of line 10 to be Credited to 2012 estimated tax			

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation \$ 0. (2) On foundation managers \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) NY		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► JANE ROGERS CLARK, MD Located at ► P.O. BOX 506, WESTON, MA	Telephone no. ► 781-237-2544 ZIP+4 ► 02493-0003		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A	
16	At any time during calendar year 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 ►	16	Yes	No X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>	1b	X
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	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(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 ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2011 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2011.)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011?	4b	X

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☒ Yes ☐ No

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

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

Organizations relying on a current notice regarding disaster assistance check here

☐**5b****X****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?☐ Yes ☒ No

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

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

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

6b**X****7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?**N/A****7b****Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 10		38,500.	0.	0.

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

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

Total number of other employees paid over \$50,000☐ 0Form **990-PF** (2011)

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

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services		0

Part IX-A	Summary of Direct Charitable Activities
------------------	--

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

1	N/A	
2		
3		
4		

Part IX-B	Summary of Program-Related Investments
------------------	---

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

1	N/A	
2		
	All other program-related investments See instructions	
3		
Total. Add lines 1 through 3		0.

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	4,188,656.
b	Average of monthly cash balances	1b	1,243,656.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	5,432,312.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	5,432,312.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	81,485.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,350,827.
6	Minimum investment return. Enter 5% of line 5	6	267,541.

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

1	Minimum investment return from Part X, line 6	1	267,541.
2a	Tax on investment income for 2011 from Part VI, line 5	2a	1,710.
b	Income tax for 2011 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	1,710.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	265,831.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	265,831.
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	265,831.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	410,663.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	410,663.
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	1,710.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	408,953.

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

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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				265,831.
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2011				
a From 2006				
b From 2007	68,075.			
c From 2008	82,696.			
d From 2009				
e From 2010				
f Total of lines 3a through e	150,771.			
4 Qualifying distributions for 2011 from Part XII, line 4 ▶ \$ 410,663.				
a Applied to 2010, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2011 distributable amount				265,831.
e Remaining amount distributed out of corpus	144,832.			
5 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:	295,603.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
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				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2006 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a	295,603.			
10 Analysis of line 9				
a Excess from 2007	68,075.			
b Excess from 2008	82,696.			
c Excess from 2009				
d Excess from 2010				
e Excess from 2011	144,832.			

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Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

N/A

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☐ 4942(j)(3) or ☐ 4942(j)(5)

Tax year	Prior 3 years			(e) Total
(a) 2011	(b) 2010	(c) 2009	(d) 2008	

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1 Information Regarding Foundation Managers:

NONE

NONE

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

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

THE JULIA & SEYMOUR GROSS FOUNDATION,
INC.

Form 990-PF (2011)

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Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<i>a Paid during the year</i>				
ATTACHMENT C				359,769.
Total			3a	359,769.
<i>b Approved for future payment</i>				
NONE				
Total			3b	0.

[illegible]

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
INTEREST INCOME - CHECKING	88.
INTEREST INCOME - INVESTMENT ACCOUNTS	12,408.
INTEREST INCOME - MONEY MARKET FUND	114.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	12,610.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DIVIDENDS FROM SECURITIES	106,283.	0.	106,283.
TOTAL TO FM 990-PF, PART I, LN 4	106,283.	0.	106,283.

FORM 990-PF LEGAL FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	3,326.	0.		3,326.
TO FM 990-PF, PG 1, LN 16A	3,326.	0.		3,326.

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BOOKKEEPING & TAX PREPARATION	15,864.	0.		15,864.
TO FORM 990-PF, PG 1, LN 16B	15,864.	0.		15,864.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
INVESTMENT ADVISORY FEES	26,728.	26,728.			0.
SENSIBLE FINANCE - FINANCIAL CONSULTANT	450.	450.			0.
TO FORM 990-PF, PG 1, LN 16C	27,178.	27,178.			0.

FORM 990-PF	TAXES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
EXCISE TAX	5,000.	0.			0.
FOREIGN TAXES	475.	475.			0.
TO FORM 990-PF, PG 1, LN 18	5,475.	475.			0.

FORM 990-PF	OTHER EXPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
DUES AND SUBSCRIPTIONS	1,661.	0.			1,661.
INSURANCE	2,200.	0.			2,200.
OFFICE EXPENSES	466.	0.			466.
FILING FEES	250.	0.			250.
BANK FEES	232.	232.			0.
TO FORM 990-PF, PG 1, LN 23	4,809.	232.			4,577.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	8
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
ATTACHMENT B		X	58,186.	64,697.
TOTAL U.S. GOVERNMENT OBLIGATIONS				
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			58,186.	64,697.
TOTAL TO FORM 990-PF, PART II, LINE 10A			58,186.	64,697.

FORM 990-PF	CORPORATE STOCK	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
ATTACHMENT B	3,646,817.	4,262,400.
TOTAL TO FORM 990-PF, PART II, LINE 10B	3,646,817.	4,262,400.

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS STATEMENT 10
 TRUSTEES AND FOUNDATION MANAGERS

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN EXPENSE CONTRIB ACCOUNT
JONATHAN P. GERTLER, MD P.O. BOX 506 WESTON, MA 02493-0003	SECRETARY 5.00	0.	0. 0.
JANE R. CLARK, MD P.O. BOX 506 WESTON, MA 02493-0003	PRESIDENT/EXECUTIVE DIRECT 21.00	38,500.	0. 0.
CLARK CHESSIN GERTLER P.O. BOX 506 WESTON, MA 02493-0003	VICE PRESIDENT 1.00	0.	0. 0.
CHARLES GARRISON GERTLER P.O. BOX 506 WESTON, MA 02493-0003	TREASURER 1.00	0.	0. 0.
ROGER D. KAMM, PHD P.O. BOX 506 WESTON, MA 02493-0003	BOARD MEMBER 0.50	0.	0. 0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		38,500.	0. 0.

The Julia & Seymour Gross Foundation
Capital Gains & Losses Schedule
 July 1, 2011 through June 30, 2012

Security	Shares	Gross Proceeds	Cost Basis	Realized Gain/Loss
Encana Corp - CAD	500	\$ 11,441 18	\$ 12,208 07	\$ (766 89)
Google Inc Class A	60	36,234 81	33,951 01	2,283 80
International Business Machines Corp	500	81,904 91	62,739 00	19,165 91
International Paper Co	3,500	\$ 122,926 18	\$ 99,816 12	\$ 23,110 06
Johnson & Johnson	1,000	63,740 77	49,658 21	14,082 56
Nestle S A Sponsored ADR	1,000	55,949 92	36,472 59	19,477 33
Wal-Mart Stores Inc	2,235	131,422 65	112,262 03	19,160 62
Wal-Mart Stores Inc	820	55,792 45	40,693 32	15,099 13
Whirlpool Corp	800	41,873 75	70,033 46	(28,159 71)
Wisconsin Energy Corp Hldg Com	1,000	38,619 13	30,568 70	8,050 43
TOTAL		\$ 639,905.75	\$ 548,402.51	\$ 91,503.24

The Julia & Seymoure Gross Foundation
Portfolio Value
As of June 30, 2011

Security	Shares	Cost Basis	Market Value
Bond			
GNMA 5.0% Due 2/20/33	100,000.00	17,384.28	18,528.77
GNMA 5.0% Due 6/20/32	50,000.00	9,050.60	12,662.35
GNMA 5.5% Due 5/20/17	50,000.00	4,461.96	3,913.63
GNMA 5.5% Due 7/20/32	101,589.00	8,590.86	9,977.36
GNMA 6% Due 5/15/32	100,116.00	8,431.08	11,577.42
GNMA 6% Due 6/20/32	100,000.00	7,092.65	6,233.54
GNMA 6.5% Due 6/15/32	49,966.00	3,174.68	1,803.25
TOTAL Bond		58,186.11	64,696.32
Stock			
3M Company	2,500.00	195,855.10	224,000.00
Apple Inc	700.00	175,374.55	408,800.00
Berkshire Hathaway Inc. Cl. B	2,500.00	121,195.50	208,325.00
Chevron Corp.	2,000.00	169,463.00	211,000.00
Cisco Systems Inc.	1,000.00	23,610.00	17,170.00
Conocophillips	1,500.00	86,481.57	83,820.00
Devon Energy Corp New	1,500.00	97,474.05	86,985.00
E I Du Pont De Nemours & Co.	3,000.00	132,091.10	151,710.00
Exxon Mobil Corp	3,500.00	244,709.75	299,495.00
General Electric Co.	6,000.00	154,052.16	125,040.00
Google Inc. Class A,	140.00	79,219.05	81,209.80
Intel Corp	2,000.00	40,219.60	53,300.00
International Paper Co.	3,500.00	110,133.80	101,185.00
Metlife Inc. Common Equity UTS SNR 5%	2,500.00	207,663.80	154,675.00
Microsoft Corp	10,000.00	272,386.30	305,900.00
National Grid PLC GBS Spons ADR New	1,500.00	62,386.00	79,485.00
Nestle S A Sponsored ADR	1,500.00	71,560.00	89,610.00
Nextera Energy Inc	1,500.00	84,878.40	103,215.00
PPG Industries Inc.	1,000.00	63,469.00	106,120.00
Peoples United Fincl Inc	6,000.00	85,037.70	69,660.00
Phillips 66	750.00	25,701.03	24,930.00
Procter & Gamble Co.	2,000.00	105,246.67	122,500.00
Southern Co.	1,500.00	52,912.40	69,450.00
Staples Inc	5,000.00	79,608.50	65,250.00
Travelers Companies Inc.	2,500.00	128,716.62	159,600.00
United Parcel Service CL B	2,500.00	183,571.65	196,900.00
Wal-Mart Stores Inc.	1,945.00	96,312.75	135,605.40
Walt Disney Co	2,000.00	66,078.00	97,000.00
Waste Mgmt Inc. Del	5,000.00	161,183.40	167,000.00
Windstream Corp.	6,000.00	88,312.32	57,960.00
Wisconsin Energy Corp. Hldg. Co.	4,000.00	120,000.00	158,280.00
Xerox Corp	6,000.00	61,912.90	47,220.00
TOTAL Stock		3,646,816.67	4,262,400.20
TOTAL Investments		\$ 3,705,002.78	\$ 4,327,096.52

The Julia Seymour Gross Foundation, Inc
Grants Paid
June 30, 2012

ATTACHMENT C

Grantee	Foundation Status	Purpose of Grant	Amount
Belmont Hill School 350 Prospect Street, Belmont, MA 02478	Public Charity	General	1,000.00
Beth David B'nai Israel Beth Am Synagogue 55 Yeoman's Road, Toronto, Canada M3H-3J7	Foreign Charity: Equivalent to US Public Charity	General	3,000.00
Boston Medical Center Office of Development, 1 Medical Center Place, Suite 1 Boston, MA 02118	Public Charity	General	15,000.00
Boston University School of Medicine Development Office, 72 East Concord Street, L-219 Boston, MA 02118	Public Charity	General	10,000.00
Children of Peace International 773 Johnson Ave Loveland, CO 80537	Public Charity	General	5,000.00
Columbia P&S Gift Systems 475 Riverside Drive, New York, NY 10115	Public Charity	General	1,000.00
Community Legal Services & Counseling Center 1 West Street, Cambridge, MA 02139	Public Charity	General	5,000.00
Cystic Fibrosis Foundation 8011-34th Avenue South, Suite 116, Bloomington, MN 55425	Public Charity	General	1,000.00
Free the Slaves 1320 19th Street NW, Suite 600 Washington, DC 20039	Public Charity	General	5,000.00

The Julia Seymour Gross Foundation, Inc
Grants Paid
June 30, 2012

ATTACHMENT C

Grantee	Foundation Status	Purpose of Grant	Amount
First Parish of Watertown 35 Church Street, Watertown, MA 02472	Public Charity	General	4,000.00
Friends of Resiliency for Life, Inc. 115 A Street, Framingham, MA 01701	Public Charity	General	1,000.00
Georgia Tech Foundation 315 Ferst Drive NW, Atlanta, Georgia 30332	Public Charity	General	17,000.00
Harvard College 124 Mount Auburn Street, Cambridge, MA 02138	Public Charity	General	1,000.00
Harvard College - Freshman Arts Program 124 Mount Auburn Street, Cambridge, MA 02138	Public Charity	General	2,000.00
Harvard College - Parents Fund 124 Mount Auburn Street, Cambridge, MA 02138	Public Charity	Parents Fund	25,000.00
Home for Little Wanderers-Waltham House 271 Huntington Ave Boston, MA 02115	Public Charity	Waltham House	5,000.00
Joslin Diabetes Center 1 Joslin Place, Boston, MA 02215	Public Charity	General	3,884.69
Kasiisi, Project, Inc. 64 Linnaean Street, Cambridge, MA 02138	Public Charity	General	15,000.00

The Julia Seymour Gross Foundation, Inc
Grants Paid
June 30, 2012

ATTACHMENT C

Grantee	Foundation Status	Purpose of Grant	Amount
Kidsquash, Inc PO Box 380321, Cambridge, MA 02238	Public Charity	General	1,000.00
Klezmer Conservatory Foundation, Inc 7 Sidney Street, Watertown, MA 02472	Public Charity	General	1,000.00
Land's Sake, Inc. 27 Crescent Street, Weston, MA 02493	Public Charity	General	1,000.00
Mass Audubon Society 208 South Great Road, Lincoln, MA 01773	Public Charity	General	538.46
Massachusetts Institute of Tech - Meredith Kamm Fund 600 Memorial Drive W98-200, Cambridge MA 02139	Public Charity	General	5,000.00
Max Warburg Courage Curriculum, Inc 360 Huntington Avenue, Box 52 Boston, MA 02115	Public Charity	General	5,000.00
McGill University McGill Development Office 1430 Peel Street, Montreal, QC H3A-3T3, Canada	Foreign Charity: Equivalent to US Public Charity	General	21,286.00
National Multiple Sclerosis Society Connecticut Chapter 659 Tower Ave, 1st floor Hartford, CT 06112	Public Charity	General	400.00
Our Sisters' School Inc. 145 Brownell Avenue New Bedford, MA 02740	Public Charity	General	1,000.00

The Julia Seymour Gross Foundation, Inc
Grants Paid
June 30, 2012

ATTACHMENT C

Grantee	Foundation Status	Purpose of Grant	Amount
Planned Parenthood League of Massachusetts 1055 Commonwealth Avenue Boston, MA 02215	Public Charity	General	50,000 00
Radcliffe Institute for Advanced Study 10 Garden Street, Cambridge, MA 02138	Public Charity	General	25,000 00
SquashBusters, Inc. 795 Columbus Avenue, Roxbury Crossing, MA 02120	Public Charity	General	10,000 00
St Paul's School Advanced Studies Program 325 Pleasant Street, Concord, NH 03301	Public Charity	General	1,000 00
Temple Beth Isreal 201 South Military Trail, Deerfield Beach, FL 33442	Public Charity	General	3,000 00
The Fund for Dartmouth Medical School DMS Office of Development, One Medical Center, Drive Lebanon, NH 03756	Public Charity	General	1,000 00
The Rivers School Conservatory Fund 333 Winters Street Weston, MA 02493	Public Charity	General	1,500 00
Town of Weston 89 Welesley Street, Weston, MA 02493	Public Charity	General	2,500 00
Town of Weston - WEEFC 89 Welesley Street, Weston, MA 02493	Public Charity	General	1,000 00

The Julia Seymour Gross Foundation, Inc
Grants Paid
June 30, 2012

ATTACHMENT C

Grantee	Foundation Status	Purpose of Grant	Amount
University of Saskatchewan c/o Jim Traves, CMA, Dir Finance & Trusts 501-121 Research Drive, Saskatoon, SK S7N-1K2	Foreign Charity Equivalent to US Public Charity	General	31,500.00
U.S. Squash 555 Eighth Avenue, Suite 1102, New York, NY 10018	Public Charity	General	1,000 00
Weill Medical College of Cornell University 1300 York Avenue, New York, NY 10021	Public Charity	General	22,500 00
Wesleyan University 318 High Street, Middletown, CT 06459	Public Charity	General	25,000 00
Weston Affordable Housing Foundation, Inc PO Box 171 Weston, MA 02493	Public Charity	General	1,000 00
Weston Public Schools - "Weston Melco Gift Fund" 444 Wellesley Street Weston, MA 02493	Public Charity	General	1,000 00
Westport River Watershed Alliance 1151 Main Road, PO Box 3427, Westport, MA 02790	Public Charity	General	6,500.00
Yale University - School of Medicine PO Box 7611, New Haven, CT 06519	Public Charity	General	20,160 00
Total Grants			<u>359,769 15</u>