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Form **990-PF**Department of the Treasury
Internal Revenue Service**Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation**

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

OMB No 1545-0052

2012

Open to public inspection

For calendar year 2012 or tax year beginning

, and ending

Name of foundation THE BAKER FAMILY FOUNDATION, INC.		A Employer identification number 04-3535659
Number and street (or P.O. box number if mail is not delivered to street address) 14 GARFIELD ROAD	Room/suite	B Telephone number 781-848-9821
City or town, state, and ZIP code MILTON, MA 02186		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 590,343.	J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

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 ☒ if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		14,681.	14,681.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		3,173.			
b Gross sales price for all assets on line 6a		3,173.			
7 Capital gain net income (from Part IV, line 2)			3,173.		
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		17,854.	17,854.		
13 Compensation of officers, directors, trustees, etc.		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 2		2,410.	1,205.		1,205.
c Other professional fees STMT 3		2,786.	2,786.		0.
17 Interest					
18 Taxes					
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 4		50.	0.		50.
24 Total operating and administrative expenses. Add lines 13 through 23		5,246.	3,991.		1,255.
25 Contributions, gifts, grants paid		26,765.			26,765.
26 Total expenses and disbursements. Add lines 24 and 25		32,011.	3,991.		28,020.
27 Subtract line 26 from line 12		-14,157.			
a Excess of revenue over expenses and disbursements					
b Net investment income (if negative, enter -0-)			13,863.		
c Adjusted net income (if negative, enter -0-)				N/A	

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12-05-12

LHA For Paperwork Reduction Act Notice, see instructions.

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Part II Balance Sheets		Beginning of year		End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1 Cash - non-interest-bearing	1.			
	2 Savings and temporary cash investments	59,090.	25,360.	25,360.	
	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				
	b Investments - corporate stock STMT 5	28,124.	14,157.	13,934.	
	c Investments - corporate bonds				
Liabilities	11 Investments - land, buildings, and equipment basis ▶				
	Less: accumulated depreciation ▶				
	12 Investments - mortgage loans				
	13 Investments - other STMT 6	551,340.	584,881.	551,049.	
	14 Land, buildings, and equipment basis ▶				
	Less: accumulated depreciation ▶				
	15 Other assets (describe ▶)				
	16 Total assets (to be completed by all filers)	638,555.	624,398.	590,343.	
	17 Accounts payable and accrued expenses				
	18 Grants payable				
Net Assets or Fund Balances	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 ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.				
	24 Unrestricted	638,555.	624,398.		
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.				
	27 Capital stock, trust principal, or current funds				
	28 Paid-in or capital surplus, or land, bldg, and equipment fund				
	29 Retained earnings, accumulated income, endowment, or other funds				
30 Total net assets or fund balances	638,555.	624,398.			
31 Total liabilities and net assets/fund balances	638,555.	624,398.			

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	638,555.
2 Enter amount from Part I, line 27a	2	-14,157.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	624,398.
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	624,398.

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 MARKETABLE SECURITIES	P		
b CAPITAL GAINS DIVIDENDS			
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 3,126.			3,126.
b 47.			47.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(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	
a			3,126.
b			47.
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	3,173.
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 the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2011	37,610.	658,061.	.057153
2010	34,070.	684,001.	.049810
2009	36,961.	661,325.	.055889
2008	37,803.	748,374.	.050514
2007	37,526.	778,422.	.048208

2 Total of line 1, column (d)	2	.261574
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	.052315
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	607,447.
5 Multiply line 4 by line 3	5	31,779.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	139.
7 Add lines 5 and 6	7	31,918.
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	28,020.

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 ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)		
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1 277.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2 0.
3 Add lines 1 and 2		3 277.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4 0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5 277.
6 Credits/Payments		
a 2012 estimated tax payments and 2011 overpayment credited to 2012	6a 633.	
b Exempt foreign organizations - tax withheld at source	6b	
c Tax paid with application for extension of time to file (Form 8868)	6c	
d Backup withholding erroneously withheld	6d	
7 Total credits and payments. Add lines 6a through 6d	7 633.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10 356.	
11 Enter the amount of line 10 to be Credited to 2013 estimated tax	11 0.	

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
b 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
c 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) MA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	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 2012 or the taxable year beginning in 2012 (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)		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)		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?		X

Website address ► N/A

14 The books are in care of ► EDWARD BAKER Telephone no ► 781-848-9821
 Located at ► 14 GARFIELD RD, MILTON, MA ZIP+4 ► 02186

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year
 ► 15 N/A

16 At any time during calendar year 2012, 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?	☐ Yes	☒ No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes	☒ No
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes	☒ No
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes	☒ No
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes	☒ No
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	☐ Yes	☒ No
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	
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 2012?		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 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? If "Yes," list the years ►	☐ Yes	☒ No
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)	N/A	
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?	☐ Yes	☒ No
b If "Yes," did it have excess business holdings in 2012 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 2012.)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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 2012?		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)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ 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?

6b

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

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

X

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
EDWARD H. BAKER	PRESIDENT, DIRECTOR			
14 GARFIELD ROAD				
MILTON, MA 02186	1.00	0.	0.	0.
MARY MCGONAGLE	TREASURER, DIRECTOR			
PO BOX 863				
NORWOOD, MA 02062	1.00	0.	0.	0.
DANIEL W. LEVERONI	CLERK, DIRECTOR			
45 BRAINTREE HILL OFFICE PARK				
BRAINTREE, MA 02184	1.00	0.	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

0

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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.	Expenses
1 N/A	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
All other program-related investments. See instructions	
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	587,789.
b	Average of monthly cash balances	1b	28,908.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	616,697.
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	616,697.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	9,250.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	607,447.
6	Minimum investment return. Enter 5% of line 5	6	30,372.

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	30,372.
2a	Tax on investment income for 2012 from Part VI, line 5	2a	277.
b	Income tax for 2012 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	277.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	30,095.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	30,095.
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	30,095.

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	28,020.
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	28,020.
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	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	28,020.

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 2011	(c) 2011	(d) 2012
1 Distributable amount for 2012 from Part XI, line 7				30,095.
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only			25,415.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2012				
a From 2007				
b From 2008				
c From 2009				
d From 2010				
e From 2011				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2012 from Part XII, line 4 ▶ \$ 28,020.				
a Applied to 2011, but not more than line 2a			25,415.	
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 2012 distributable amount				2,605.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013				27,490.
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 2007 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9				
a Excess from 2008				
b Excess from 2009				
c Excess from 2010				
d Excess from 2011				
e Excess from 2012				

N/A

- ☐ 4942(j)(3) or ☐ 4942(j)(5)

- (4) Gross investment income**

[illegible]

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

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
a Paid during the year				
ALS FAMILY CHARITABLE FOUNDATION, INC P.O. BOX 229 BUZZARDS BAY, MA 02532	N/A	N/A	SUPPORT	100.
ALZHEIMERS FOUNDATION 322 8TH AVE NEW YORK, NY 10001	N/A	N/A	SUPPORT	200.
AMERICAN CANCER SOCIETY 30 SPEEN STREET FRAMINGHAM, MA 01701	N/A	N/A	SUPPORT	2,200.
BOSTON COLLEGE 140 COMMONWEALTH AVENUE CHESTNUT HILL, MA 02467	N/A	N/A	SUPPORT	5,000.
BOURNE BRAVES BASEBALL P.O. BOX 895 MONUMENT BEACH, MA 02553	N/A	N/A	SUPPORT	200.
Total	SEE CONTINUATION SHEET(S)			26,765.
b Approved for future payment				
NONE				
Total				0.

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
CAPE COD SYMPHONY 712A MAIN STREET YARMOUTH PORT, MA 02675	N/A	N/A	SUPPORT	200.
CURRY COLLEGE 1071 BLUE HILLS AVENUE MILTON, MA 02186	N/A	N/A	SUPPORT	1,100.
DANA FARBER CANCER INST 10 BROOKLINE PLACE BROOKLINE, MA 02445	N/A	N/A	SUPPORT	100.
EASTER SEALS 484 MAIN ST WORCESTER, MA 01608	N/A	N/A	SUPPORT	200.
FRIENDS OF COUNCIL ON AGING 10 WALNUT STREET MILTON, MA 02186	N/A	N/A	SUPPORT	100.
FRIENDS OF THE BLUE HILLS P.O. BOX 416 MILTON, MA 02186	N/A	N/A	SUPPORT	235.
FRIENDS OF THE MILTON PUBLIC LIBRARY 476 CANTON AVENUE MILTON, MA 02186	N/A	N/A	SUPPORT	200.
JOSLIN DIABETES CTR ONE JOSLIN PLACE BOSTON, MA 02215	N/A	N/A	SUPPORT	1,000.
MIKE DEVIN MEMORIAL FUND 94 ANTWERP STREET MILTON, MA 02186	N/A	N/A	SUPPORT	175.
MILTON ANIMAL LEAGUE 181 GOVERNOR STOUGHTON LANE MILTON, MA 02186	N/A	N/A	SUPPORT	200.
Total from continuation sheets				19,065.

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
MILTON HIGH BOOSTERS 25 GILE ROAD MILTON, MA 02186	N/A	N/A	SUPPORT	200.
MILTON HOSPITAL 92 HIGHLAND ST MILTON, MA 02186	N/A	N/A	SUPPORT	500.
MILTON KIWANIS 532 ADAMS ST MILTON, MA 02186	N/A	N/A	SUPPORT	240.
MILTON ROTARY 61 SCHOOL STREET MILTON, MA 02186	N/A		SUPPORT	200.
NATIONAL PARKINSONS FOUNDATION 1501 NW 9TH AVE MIAMI, FL 33136	N/A	N/A	SUPPORT	2,000.
NATIONAL WILDLIFE FED 11100 WILDLIFE CENTER RESTON, VA 20190	N/A	N/A	SUPPORT	200.
NEW ENGLAND WILDLIFE CENTER 500 COLUMBIAN STREET SOUTH WEYMOUTH, MA 02190	N/A	N/A	SUPPORT	200.
RENAISSANCE CHARITABLE FOUNDATION 6100 W. 96TH ST. STE 105 INDIANAPOLIS, IN 46278	N/A		SUPPORT	5,000.
SOUTH SHORE HOSPITAL SOC 44 FOGG ROAD SOUTH WEYMOUTH, MA 02190	N/A	N/A	SUPPORT	100.
ST. AGATHAS PARISH 432 ADAMS ST MILTON, MA 02186	N/A	N/A	SUPPORT	200.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
ST. ELIZABETHS PARISH 350 REEDSDALE ROAD MILTON, MA 02186	N/A	N/A	SUPPORT	200.
ST. GREGORY'S PARISH 2223 DORCHESTER AVENUE DORCHESTER, MA 02124	N/A	N/A	SUPPORT	500.
ST. JOHN'S PARISH 15 VIRGINIA ROAD POCASSET, MA 02559	N/A	N/A	SUPPORT	200.
ST. MARY OF THE HILLS 29 ST. MARY'S ROAD MILTON, MA 02186	N/A	N/A	SUPPORT	1,530.
STONEHILL COLLEGE 320 WASHINGTON ST EASTON, MA 02357	N/A	N/A	SUPPORT	2,100.
WGBH P.O. BOX 200 BOSTON, MA 01199	N/A	N/A	SUPPORT	200.
WORLD WILDLIFE FUND 1250 24 ST NW WASHINGTON, DC 20090	N/A	N/A	SUPPORT	200.
BETH ISRAEL 333 BROOKLINE AVENUE BOSTON, MA 02215	N/A	N/A	SUPPORT	100.
BOURNE VFW 180 SHORE ROAD BUZZARDS BAY, MA 02532	N/A	N/A	SUPPORT	50.
CANTON VETERAN'S SERVICES 801 WASHINGTON STREET CANTON, MA 02021	N/A	N/A	SUPPORT	100.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
MILTON COMMUNITY RESERVATION 10 MILK STREET BOSTON, MA 02108	N/A	N/A	SUPPORT	100.
MILTON 350TH CELEBRATION 525 CANTON AVE MILTON, MA 02186	N/A	N/A	SUPPORT	100.
MILTON HIGH HALL OF FAME 25 GILE ROAD MILTON, MA 02186	N/A	N/A	SUPPORT	60.
MILTON HIGH SCHOOL 25 GILE ROAD MILTON, MA 02186	N/A	N/A	SUPPORT	1,000.
MILTON COUNCIL ON AGING 10 WALNUT STREET MILTON, MA 02186	N/A	N/A	SUPPORT	50.
MILTON CEMETARY GIFT FUND 211 CENTRE STREET MILTON, MA 02186	N/A	N/A	SUPPORT	100.
FRANCISCAN MISSIONARIES OF MARY 28 VICTORY HWY W GREENWICH, RI 02817	N/A	N/A	SUPPORT	100.
MARY M.B. WAKEFIELD CHARITABLE TRUST 1465 BRUSH HILL ROAD MILTON, MA 02186	N/A	N/A	SUPPORT	25.
Total from continuation sheets				

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DIVIDENDS AND INTEREST	14,728.	47.	14,681.
TOTAL TO FM 990-PF, PART I, LN 4	14,728.	47.	14,681.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	2
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LIVINGSTON & HAYNES, PC	2,410.	1,205.		1,205.
TO FORM 990-PF, PG 1, LN 16B	2,410.	1,205.		1,205.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	2,786.	2,786.		0.
TO FORM 990-PF, PG 1, LN 16C	2,786.	2,786.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
STATE FILING FEES	50.	0.		50.
TO FORM 990-PF, PG 1, LN 23	50.	0.		50.

FORM 990-PF	CORPORATE STOCK	STATEMENT	5
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
SPDR GOLD TRUST GOLD SHARES	14,157.	13,934.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	14,157.	13,934.	

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	6
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
INLAND WESTERN RETAIL REAL ESTATE TRUST	COST	123,295.	71,820.
PIMCO FDS PAC INVT MGMT SER	COST	21,907.	23,839.
PIMCO FDS TOTAL RETURN	COST	100,073.	105,556.
BLACKROCK GLOBAL	COST	20,424.	21,754.
FIRST EAGLE FUNDS GLOBAL	COST	21,105.	22,484.
IVY FUNDS ASSET STRATEGY	COST	20,426.	23,193.
AQR FUND DIVERSIFIED ARBITRAGE	COST	16,768.	16,394.
ARTISAN FDS MID CAP	COST	7,467.	7,303.
EATON VANCE MUNI NATL INCME FD	COST	12,814.	15,196.
FORWARD FUNDS GLOBAL INFRASTRUCTURE	COST	5,440.	5,388.
HOTCHKIS WILEY HIGH YIELD	COST	11,454.	11,527.
ISHARES INVESTMENT GRADE CORP BOND	COST	23,919.	24,319.
ISHARES BARCLAYS MBS BOND FD	COST	43,691.	43,520.
JPMORGAN STRATEGIC INCOME OPP	COST	11,018.	10,983.
RS INVT TRUST GLOBAL NAT RESOURCE	COST	6,750.	6,482.
TURNER FUNDS SPECTRUM FUND	COST	6,845.	6,369.
PIMCO FDS GLOBAL MULTI ASSET FD	COST	21,168.	21,634.
WESTERN ASSET FDS COR PLUS	COST	16,012.	17,357.
DOUBLELINE TOTAL RETURN BOND	COST	19,350.	19,641.
ISHARES BARCLAYS U.S. TREASURY BOND	COST	19,794.	20,254.
ISHARES HIGH YIELD CORPORATE BOND	COST	14,399.	14,563.
ISHARES RUSSELL MID CAP INDEX	COST	7,526.	7,804.
ISHARES S&P NATIONAL AMT FREE BOND	COST	15,802.	15,600.
VIRTUS EMERGING MARKETS OPPORTUNITIES		8,007.	8,000.
WELLS FARGO ADVANTAGE DIVERSIFIED CAP	COST	9,427.	10,069.
TOTAL TO FORM 990-PF, PART II, LINE 13		584,881.	551,049.