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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.

| | | of the Treasury enue Service Note. The foundation may be | reated as a Privat be able to use a copy of this | return to satisfy | i on / state repor | ting requirements. | Open to public Inspection |
|----------------|------------|--|---|-------------------|------------------------------|--|---|
| | | dar year 2012 or tax year beginning | | , and end | _ | | |
| | | foundation | | <u>-</u> | | A Employer identificatio | n number |
| R | OBI | ERT I. LAPPIN CHARITABL | E FOUNDATION | | | 04-6579206 | 5 |
| | | nd street (or P O box number if mail is not delivered to street | | F | Room/suite | B Telephone number | 1 |
| _2 | 9 (| CONGRESS ST. PO BOX 9 | 86 | | | (978)744-0 | 0556 |
| City | or to | own, state, and ZIP code | | | | C If exemption application is | pending, check here |
| | | EM, MA 01970 | | | | | |
| G C | heck | all that apply: Initial return | Initial return of a fo | ormer public cha | arity | D 1. Foreign organization | is, check here |
| | | Final return | Amended return | | | Foreign organizations m check here and attach or | eeting the 85% test, |
| | h = =1. | type of organization: X Section 501(c)(3) ex | Name change | - | | | |
| <u> </u> | _ | · · · · · · · · · · · · · · · · · · · | Other taxable private founda | ation | , | E If private foundation st under section 507(b)(1 | |
| I Fa | | rket value of all assets at end of year J Accounti | | X Accrua | 3 | F If the foundation is in a | |
| | | | ther (specify) | | | under section 507(b)(1 | |
| • | | 1,106,050 . (Part I, colu | mn (d) must be on cash l | basis) | | | |
| Pa | rt I | (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 inve | | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) |
| | 1 | Contributions, gifts, grants, etc., received | 670,533. | | | N/A | (otasii basis ciny) |
| ~ | 2 | Check If the foundation is not required to attach Sch B | 0,0,3330 | | | 517.55 | |
| ۶۱ ۸ ۶ | 3 | Interest on savings and temporary cash investments | 1,889. | 1 | ,889. | | STATEMENT 2 |
| | 4 | Dividends and interest from securities | 8,788. | | 788. | | STATEMENT 3 |
| a ≕ | 5a | Gross rents | | | | | |
| > | b | Net rental income or (loss) | | | _ | | |
| ₽ | 6a | Net gain or (loss) from sale of assets not on line 10 | 54,534. | | | | STATEMENT 1 |
| | b | Gross sales price for all assets on line 6a 74,219. | | | | | |
| | 7 | Capital gain net income (from Part IV, line 2) | | 23 | ,154. | | |
| 2 | 8 | Net short-term capital gain | | | | | |
| SCANNED NUV 1 | 9 | Income modifications Gross sales less returns | - | | | | - |
| Š | 10a | and allowances | | | | | |
| | l | Gross profit or (loss) | | · - | | | |
| | 11 | Other income | 14,195. | 14 | 1,195. | | STATEMENT 4 |
| | 12 | Total. Add lines 1 through 11 | 749,939. | 4.8 | 026. | | |
| | 13 | Compensation of officers, directors, trustees, etc | 0. | | 0. | | 0. |
| | 14 | Other employee salaries and wages | 174,515. | | 0. | | 174,515. |
| ຜ | l . | Pension plans, employee benefits | 13,598. | | 0. | | 13,598. |
| Expenses | i | Legal fees BECESTMT 5 | 4,583. | | 0. | | 0. |
| <u>p</u> | | Accounting fees REUESTMT 6 Other professional fees STMT 7 | 3,472. 36,505. | | 0. | | 0. |
| e E | C 17 | Other profess on fees STMT 7 7 10 Interest 8 NOV 1 5 2013 | 30,303. | | <u> </u> | | |
| ati | | THE SECTION OF THE PROPERTY OF | 15,023. | | 0. | | 15,023. |
| Administrative | 19 | Depreciation and depletion Occupancy OGDEN, UT | 1,142. | | 0. | | |
| ë. | 20 | Occupancy OGDEN, U1 | | | | | |
| Ad | 21 | Travel, conferences, and meetings | | | | | |
| and | 22 | Printing and publications | | | | | |
| ng. | 23 | Other expenses STMT 9 | 89,812. | | 0. | | 89,812. |
| rati | 24 | Total operating and administrative | 222 552 | | • | | 000 040 |
| Operating | | expenses. Add lines 13 through 23 | 338,650. | | 0. | | 292,948. |
| _ | 25 | Contributions, gifts, grants paid | 38,119. | | | | 38,119 |
| | 26 | Total expenses and disbursements. Add lines 24 and 25 | 376,769. | | 0. | | 331,067 |
| | 27 | | 3,70,703. | | | | |
| | 1 | Excess of revenue over expenses and disbursements | 373,170. | | | | |
| | l . | Net investment income (if negative, enter -0-) | | 4.8 | 3,026. | | |
| _ | | Adjusted net income (if negative enter -0-) | | | | N/A | |
| 2235 12-0 | 01 5-12 | LHA For Paperwork Reduction Act Notice, see | instructions. | | | | Form 990-PF (2012 |

| Beginning of year | End of | |
|---|--|---------------------------|
| Part II Balance Sneets | | |
| (a) Book Value | (b) Book Value | (c) Fair Market Value |
| 1 Cash - non-interest-bearing 25,356. | 66,730. | 66,730. |
| 2 Savings and temporary cash investments 36,194. | 51,236. | 51,236. |
| 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 | | |
| | | |
| 9 Prepaid expenses and deferred charges 10 Investments - U.S. and state government obligations | | |
| 10a Investments - U.S. and state government obligations | | |
| b Investments - corporate stock | | |
| c Investments - corporate bonds | | |
| 11 Investments - Land, buildings, and equipment basis | | · · · · · · |
| | 1 | |
| Less accumulated depreciation | | |
| 12 Investments - mortgage loans | <u></u> | |
| 13 Investments - other 14 Land, buildings, and equipment: basis ► 4,754. | | |
| 14 Land, buildings, and equipment: basis ► 4,754. Less accumulated depreciation STMT 10► 3,902. 226. | 852. | 852. |
| | | 987,232. |
| 15 Other assets (describe ► STATEMENT 11) 612,492. | 949,099. | 701,232. |
| 16 Total assets (to be completed by all filers) 674, 268. | 1,048,717. | 1,106,050. |
| 17 Accounts payable and accrued expenses 12,090. | 12,433. | 1,100,030. |
| 18 Grants payable | 12/1331 | |
| 40 Potential management | | |
| 20 Loans from officers, directors, trustees, and other disqualified persons 21 Mortgages and other notes payable 22 Other liabilities (decembs > CIDA DEMENIII 12) 23 5 8 2 7 | | |
| Coans from officers, directors, trustees, and other disqualified persons 21 Mortgages and other notes payable | | ٠. |
| 22 Other liabilities (describe STATEMENT 12) 5,827. | 6,763. | |
| DIATHMENT 12) 3,027. | 0,703. | |
| 23 Total liabilities (add lines 17 through 22) 17,917. | 19,196. | |
| Foundations that follow SFAS 117, check here | 2372300 | |
| and complete lines 24 through 26 and lines 30 and 31. | | |
| 24 Unrestricted | | |
| 25 Temporarily restricted | | |
| 26 Permanently restricted | | |
| 24 Unrestricted 25 Temporarily restricted 26 Permanently restricted Foundations that do not follow SFAS 117, check here and complete lines 27 through 31 | ······································ | |
| and complete lines 27 through 31. | | |
| O | 0. | |
| 28 Paid-in or capital surplus, or land, bldg., and equipment fund | 0. | |
| 29 Retained earnings, accumulated income, endowment, or other funds 656, 351. | | , |
| Paid-in or capital surplus, or land, bldg., and equipment fund Patained earnings, accumulated income, endowment, or other funds Total net assets or fund balances 27 Capital stock, it us principal, or current funds 0 . 656,351. | | |
| Z 30 Total liet assets of fulld balances | 1,023,321. | |
| 31 Total liabilities and net assets/fund balances 674, 268. | 1,048,717. | |
| Part III Analysis of Changes in Net Assets or Fund Balances | <u> </u> | · |
| | | |
| 1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 | | CEC 351 |
| (must agree with end-of-year figure reported on prior year's return) | 1 | 656,351. |
| 2 Enter amount from Part I, line 27a | 2 | 373,170. |
| 3 Other increases not included in line 2 (itemize) | 3 | 1,029,521. |
| 4 Add lines 1, 2, and 3 | 4 | 1,029,521. |
| 5 Decreases not included in line 2 (itemize) 6 Total pat appets or fund balances at and of year (line 4 minus line 5) - Part II, column (b), line 30 | 5 6 | 1,029,521. |
| Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 | | Form 990-PF (2012) |

| | ERT I. LAPPIN | | | ATION | 0 | 4-657 | 9206 Page 3 |
|--|---|---------------------------|--------------------------------------|---|---------------|--------------------------------|-----------------------------------|
| | and Losses for Tax | | | (h) How cocoured | T | | |
| (a) List and desc | ribe the kind(s) of property so arehouse; or common stock, t | old (e.g., real estate, | | (b) How acquired P - Purchase | (c) Date | acquired lay, yr.) | (d) Date sold (mo., day, yr.) |
| | irenduse, or common stock, a | 200 3113. WILO 00.) | | D - Donation | (, | | (,,, ,, |
| 1a b SEE ATTACHED | STATEMENT | <u> </u> | | | | | |
| C 200 111 11101120 | <u> </u> | | - L | | | | |
| d | | | | | | | _ |
| е | | | | | | _ | |
| (e) Gross sales price | (f) Depreciation allower | | st or other basis | | | Sain or (loss) | |
| | (or allowable) | pius e | expense of sale | | (e) più | s (f) minus (| <u>"-"-</u> |
| <u>a</u> | | | | | | | - - |
| b c | | | | | | | |
| d | | | | | | | |
| e 74,219. | | | 51,06 | 5. | | | 23,154. |
| Complete only for assets shown | ng gain in column (h) and ow | ned by the foundation | on 12/31/69 | | (I) Gains (0 | Col. (h) gain not less thar | minus |
| (i) F.M.V. as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | | cess of col. (I) col. (J), If any | | Losses | (from col. (| h)) |
| <u>a</u> | | | | | | | |
| <u>b</u> | | | | | | | |
| <u>C</u> | | | | | | | |
| <u>d</u> | | - | | | | | 23,154. |
| | C If gain, als | so enter in Part I, line | 7 | 7 | | | |
| 2 Capital gain net income or (net ca | apital loss) { If (loss), 6 | enter -0- in Part I, line | 7 | <u>}</u> | | | 23,154. |
| 3 Net short-term capital gain or (lo | ss) as defined in sections 122 | 22(5) and (6): | | | | | |
| If gain, also enter in Part I, line 8, | , , | | | \downarrow | | 37 / 3 | |
| Part V Qualification U | Inder Section 4940(| a) for Reduced | Tay on Net | <u> </u> | ncome | N/A | |
| (For optional use by domestic privat | • | - | | | | | |
| | · | 10 10 (u) tax u. | | , | | | |
| If section 4940(d)(2) applies, leave t | his part blank. | | | | | | |
| Was the foundation liable for the sec | | , , | • | od? | | | Yes X No |
| If "Yes," the foundation does not qua 1 Enter the appropriate amount in | | | | ntrioe | | | |
| (a) | | b) | lore making any er | (c) | | | (d) |
| Base periód years Calendar year (or tax year beginn | | ying distributions | Net value of nor | ncharitable-use ass | ets | Distrib (col. (b) div | oùtión ratio Ided by col. (c)) |
| 2011 | , | 427,105. | | 482,5 | 32. | | .885133 |
| 2010 | | 691,272. | | 191,6 | 14. | | 3.607063 |
| 2009 | | 344,874. | | 236,1 | | | 1.460223 |
| 2008 | | 753,774. | | 303,9 | | - . | 2.480026 .125012 |
| 2007 | | 859,307. | | 0,013,1 | 34. | 1 | .125012 |
| 2 Total of line 1, column (d) | | | | | 2 | İ | 8.557457 |
| 3 Average distribution ratio for the | 5-year base period - divide th | e total on line 2 by 5, | or by the number | of years | | | |
| the foundation has been in existe | | , | • | • | 3 | | 1.711491 |
| | | | | | | | |
| 4 Enter the net value of noncharita | ble-use assets for 2012 from | Part X, line 5 | | | 4 | | 896,525. |
| - M. II | | | | | _ | | 1 524 204 |
| 5 Multiply line 4 by line 3 | | | | | 5 | | 1,534,394. |
| 6 Enter 1% of net investment inco | me (1% of Part I, line 27b) | | | | 6 | | 480 |
| | • | | | | | | |
| 7 Add lines 5 and 6 | | | | | 7 | | 1,534,874. |
| | 5 | | | | | | 224 245 |
| 8 Enter qualifying distributions from | | | | 404 | 8 | 1 | 331,067. |
| If line 8 is equal to or greater tha See the Part VI instructions. | n line 7, check the box in Part | VI, line 1b, and comp | piete that part using | j a 1% tax rate. | | | |
| 200501 10 05 10 | | | - | | | F | orm 990-PF (2012 |

| | 990-PF rt VI | (2012) ROBERT I. LAPPIN CHARITABLE FO Excise Tax Based on Investment Income (Section 494 | OUND 0(a), 4 | ATION 1940(b), 4940(e), | 0 <u>4</u> or 494 | .–657 8 - se€ | 9206 instru | | age 4 |
|----|--------------------------|--|-----------------|------------------------------|----------------------|------------------|-----------------|-------------|--|
| | | operating foundations described in section 4940(d)(2), check here and e | | | _ | \Box | _ | | |
| | Date of | ruling or determination letter: (attach copy of letter if ned | cessary- | see instructions) | | | | | |
| b | Domest | ic foundations that meet the section 4940(e) requirements in Part V, check here | ▶ □ | and enter 1% | | | | 9 | <u>61.</u> |
| | of Part I | l, line 27b | | | | | | | |
| C | All other | r domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% $^{\prime\prime}$ | 6 of Part | : I, line 12, col. (b). ノ | | | | | |
| 2 | Tax und | der section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. O | thers en | ter -0-) | 2 | <u></u> | | | <u>0.</u> |
| 3 | Add line | es 1 and 2 | | | 3 | Ц | | 9 | <u>61.</u> |
| | | A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. C |)thers er | nter -0-) | 4 | | | | 0. |
| 5 | Tax bas | sed on investment income. Subtract line 4 from line 3. If zero or less, enter -0- | | | 5 | <u> </u> | | <u>9</u> | <u>61.</u> |
| 6 | Credits/ | Payments: | | ı | | | | | , |
| а | 2012 es | stimated tax payments and 2011 overpayment credited to 2012 | 6a | | | | | | |
| b | Exempt | foreign organizations - tax withheld at source | 6b | | | | • | | |
| C | Tax paid | d with application for extension of time to file (Form 8868) | 6c | 2,0 | 00. | | | | |
| d | Backup | withholding erroneously withheld | _6d | | | | | | |
| | | edits and payments. Add lines 6a through 6d | | | 7 | | | <u>2,0</u> | <u>00.</u> |
| 8 | Enter ar | ny penalty for underpayment of estimated tax. Check here 📖 if Form 2220 is atta | ached | | _ [| | | | |
| 9 | Tax due | e. If the total of lines 5 and 8 is more than line 7, enter amount owed | | | | 9 | | | |
| 10 | Overpay | yment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid | | 1 | ▶ 1 | | | 1,0 | |
| | | e amount of line 10 to be: Credited to 2013 estimated tax | | 1,039. Refunde | d ▶ 1 | 1 | | | <u>0.</u> |
| | | A Statements Regarding Activities | | | | | | \ <u>-</u> | • |
| 1a | During t | the tax year, did the foundation attempt to influence any national, state, or local legis | slation o | r did it participate or inti | rvene in | | <u> </u> | Yes | |
| | | itical campaign? | | | | | 1a | | <u>X</u> |
| | | pend more than \$100 during the year (either directly or indirectly) for political purpo | | | | | 1b | | <u>X</u> |
| | If the a | inswer is "Yes" to 1a or 1b, attach a detailed description of the activities an | nd copie | es of any matenals pu | blished c | r | | | |
| | dıstrıbı | uted by the foundation in connection with the activities. | | | | | | | |
| C | Did the | foundation file Form 1120-POL for this year? | | | | | 1c | | _X_ |
| d | | e amount (if any) of tax on political expenditures (section 4955) imposed during the | | | | | | | |
| | | the foundation. \blacktriangleright \$ (2) On foundation managers | | | <u>0.</u> | | | | |
| е | Enter th | ne reimbursement (if any) paid by the foundation during the year for political expend | liture tax | imposed on foundation | l | | | | |
| | manage | ers. ► \$0 . | | | | | . | | |
| 2 | Has the | foundation engaged in any activities that have not previously been reported to the l | RS? | | | | 2 | | <u> </u> |
| | 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 | ınstrum | ent, articles of incorpora | ition, or | | | | |
| | bylaws, | or other similar instruments? If "Yes," attach a conformed copy of the chang | es | | | | 3 | | X |
| 4a | Did the | foundation have unrelated business gross income of \$1,000 or more during the year | ar? | | | | 4a | | X |
| þ | If "Yes," | has it filed a tax return on Form 990-T for this year? | | | | N/A | 4b | | |
| 5 | Was the | ere a liquidation, termination, dissolution, or substantial contraction during the year | ? | | | | 5 | | X |
| | | ," attach the statement required by General Instruction T | | | | | i | | |
| 6 | Are the | requirements of section 508(e) (relating to sections 4941 through 4945) satisfied e | ether: | | | | | | |
| | By lar | nguage in the governing instrument, or | | | | | | | |
| | By sta | ate legislation that effectively amends the governing instrument so that no mandato | ry direct | ions that conflict with th | e state lav | 1 | | | |
| | rema | in in the governing instrument? | | | | | 6 | | X |
| 7 | | foundation have at least \$5,000 in assets at any time during the year? | | | | | 7 | X_ | <u> </u> |
| | - | ," complete Part II, col. (c), and Part XV. | | | | | | | |
| 8a | Enter th | ne states to which the foundation reports or with which it is registered (see instruction | ons) 🕨 | | | | _ | | |
| | <u>MA</u> | | | ·· · | | | - | | |
| b | If the ar | nswer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the A | Attorney | General (or designate) | | | İ | | |
| | of each | state as required by General Instruction G? If "No," attach explanation | | | | | <u>8b</u> | X_ | |
| 9 | | oundation claiming status as a private operating foundation within the meaning of s | | | or calenda | ır | | | |
| | - | 12 or the taxable year beginning in 2012 (see instructions for Part XIV)? If "Yes," of | | | | | 9_ | | X |
| 10 | Did any | persons become substantial contributors during the tax year? If "Yes," attach a sched | ule listing | their names and addresses | | | 10 | X | <u></u> |
| | | | | | | F | Form 990 | 1-PF | (2012) |

223531 12-05-12

| 11 At any time during that year, did the foundation, directly or indirectly, own a controlled entity within the maximing of section \$12(0)(13)? If Yes, attach schedule (see instructions)? 12 | | 990-PF (2012) ROBERT I. LAPPIN CHARITABLE FOUNDATION 04-657 art VII-A Statements Regarding Activities (continued) | 9206 | ! | Page 5 |
|--|----|--|--------------|------|--------------|
| section SIZ(()\(13)\(21\) If Yes, attach schedule (see instructions) Did the foundation make a distribution to a doma advess fund over which the foundation or a disqualified person had advesory privileges? If Yes, attach statement (see instructions) Did the foundation comply with the public inspection requirements for ds annual returns and exemption application? Website address ▶ RILCF_ORG 1 The boots are in care of ▶ ROBERT I. LAPPIN Telephone inc. ▶ 97.8 - 7.44 - 0.556 1 The boots are in care of ▶ ROBERT I. LAPPIN Telephone inc. ▶ 97.8 - 7.44 - 0.556 1 The boots are micro of ▶ ROBERT I. LAPPIN Section 4947(a)(1) increasing threat streeting or accurate dump they ear and either the anount of tax-eventy interest received or accrued dump they ear 16. At any time dump calendary year 2012, did the foundation have an interest in or a signature or other authority over a bank, securities, or or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Point TO F.90-22.1. If Yes, enter the name of the foreign country. Part VII-B Statements Regarding Activities for Which Form 77.9 Boots and Point is checked in the Yes' column, unless an exception applies. 1 Every part of the soundation (either directly or indirectly): (1) Engage in the sale or acchange, 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 assqualified person? (3) Furnish quotis, services, or leasing of property with a disqualified person? (4) Pay compensation to, or pay or remitiouse the expenses of, a disqualified person? (5) Transfer any imomer or assets to a disqualified person? (6) Agree to buy money or property to a povernment official? (Exception, Check No' if the foundation engage in a private private private properties of the properties of t | | | | | |
| 12 Did the foundation make a distribution to a conor advesed fund over which the foundation or a disqualified person had advisory privileges? If Yes, Tathout statement (see instructions) 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ _RILCP_ORG 14 The books are in care of ▶ _ROBERT I. LAPPIN | •• | | _11 | | X |
| If Yes, attach statement (see instructions) 10. dit fe foundation comply with the public imspection requirements for its annual returns and exemption application? Website address ▶ RILCF, ORG 14. The books are in care of ▶ ROBERT I. LAPPIN Section 4987(a)(1) enceimpt the property of the public imspection requirements for its annual returns and exemption application? 15. Section 4987(a)(1) enceimpt threat feeder triasts filing from 930°PF in leu of Form 1041 - Check here and enter the annual of the x-eventy interest received or accrued during the year 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 and foreign country? No the instructions for exceptions and filing requirements for Form 10 F 90-22.1, if Yes, enter the name of the foreign country. Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a burning the year of the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or lessing of property with a disqualified person? (2) Borrow money from, lend money for, or herinwes extend credet to (or accept it from) a sisqualisted person? (3) Furnish poods, services, or facilities to (or accept them from) a dequalified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any incorine or assets to a disqualified person (or indice any in the foundation or property to a government florida? (Exception, Check 'No' if the foundation arged or an a current incide regarding disaster assistance check here (6) Agrie to pay money or property to a government florida? (Exception, Check 'No' if the foundation arged in an a printy yarm in any of the acts described in 1s, other than exceptions described in Regulations (explain to incorrect valuation of asset) in the yars with a disaster assistance check | 12 | | | - | |
| Website address ► RILCF ORG 14 The books are in care of ► ROBERT 1. LAPPIN | | | 12 | | X |
| 14 The books are in care of ▶ ROBERT 1. LAPPIN Telephone no. ▶ 978-744-0556 Located at ▶ PO BOX 986, SALEM, MA 15 Section 497(a)(1) nonexempt charitable truss thing form 990-PF in lieu of Form 1041 - Check here and enter the amount of two-exempt interest received or accrued during the year 16 A any time during calends year 2012, dut the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country' 16 A any time during calends year 2012, dut the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country' 17 Sea the instructions for exceptions and filing requirements for Form 10 F 90-22.1. If Yes, enter the name of the foreign country' 18 File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 Engern 4720 if any item is checked in the "Yes" column, unless an exception applies. 10 Engern the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, linid 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 rembuse the expenses of, a disqualified person? (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 the employ the official for a period after termanation of government services, it formalism within 90 days, or a current notice regarding dissatire assistance (see instructions)? 10 Agree to pay money or proprety to a government official? (Exception, Check No' if the foundation engage in a prior year in any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(a)(2) or a distribute income (section 4942) (does not applying the provisions of section 4942(a)(| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? | 13 | X | |
| Located at P.P.O. BOX 986 SALEM, MA Section 4947(a)(1) nonexempt characteristic from 990-Ph in less of Form 1041 - Check here and enter the amount of tax-exempt without prices of acrued during his year and enter the amount of tax-exempt without prices from 990-Ph in less of Form 1041 - Check here and enter the amount of tax-exempt without prices from 990-Ph in less of Form 1041 - Check here and enter the amount of tax-exempt without prices from 990-Ph in less of Form 1041 - Check here and enter the amount of tax-exempt without prices for Which Form 4720 May Be Required File Form 4720 If any term is checked in the "Yes" column, unless an exception applies. 1a During the year did the foundation (either directly or indirectly): (1) Engage in this sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money fun, or indirectly exempt of throm) a disqualified person? (3) Furnish poods, 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 assists to adequalified 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, it ferminating within 90 days.) b If any answers in Yey to 141/160, did any of the acts fall to qualify under the exceptions described in Regulations section 53.4941(d):3 or in a current notice regarding disaster assistance clock here c Did the foundation angeed to make a grant to or to employ the official for a period after termination of government service, it ferminating within 90 days.) b If any as service in the provision of 4922((i)(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 (b) and attach state | | Website address ► RILCF.ORG | | | |
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| 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) Furnsh poods, 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 "Set" to 1a(1)-(6), dia any of the acts fait to qualify under the exceptions described in Regulations section 53.491-(19)-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)? A the end of tax year 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XiIII) for tax year(s) beginning before 2012? If Yes, is the years beginning in 2012? Taxes on faiture to distribute income (section 4942(in)) or 4942(in)(5): A the end of tax year 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XiIII) for tax year(s) beginning before 2012? If Yes, is the years is undistributed income? (If applying section 4942(a)(2) tall years issted, answer "No" and attach statement—see instructions.) If Yes, did it have excess business holdings in 2012 as a result of (1) any pur | | | 16 | L | |
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| (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.) If 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(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012? Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(a)(3) or 4942(i)(5): 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 At the end of tax year 2012, 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.) At the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If "Yes," did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? If "Yes," did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year of the provisions of section 4943(a)(c) (7) to dispose of holdings acqui | | | | | |
| (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person?) (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) b) If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? C) Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012? 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 > b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) c) If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. D) 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 during the year? D) 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 accurred by grift or bequest; or (3) the la | | | | | |
| 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 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 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 2012? 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 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 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. b | | the same and the s | | | |
| (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 2012? 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 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 Issted 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. Define the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during 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 If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. Phase in the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? No b If Yes," did it have excess business holdings in 2012 as a | | | | | |
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| termination of government service, if terminating within 90 days.) b 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(d)-3 or in a current notice regarding disaster assistance (see instructions)? C Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012? 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 A rethere any years Islaed 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. 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 during the year? A Did the foundation for 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) 4a Did the foundation make any investment in a prior year (but after December 31, 1969) that could geopardize its charitable purpose that had not been removed from geopardy before the first day of the tax year beginn | | | | | |
| 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 2012? 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 X No If "Yes," stift 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. N/A | | | | | |
| 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 2012? 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 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 b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? b If Yes," did it have excess business holdings in 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) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2012? 4b X | ı | | | | |
| 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 2012? 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 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 I beginning in 2012? If "Yes," list the years I beginning 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. b 1a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? 1b 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 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 2012) 1a 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 2012? | | | _1b | | |
| before the first day of the tax year beginning in 2012? 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 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 X 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.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. | | Organizations relying on a current notice regarding disaster assistance check here | | | |
| 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 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. | (| Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected | | | |
| 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 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. | | | 1c | ļ | X |
| 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 ▶ | 2 | | | | |
| before 2012? If "Yes," list the years \ | | | | | |
| 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.) 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. —————————————————————————————————— | | | | | |
| 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. | | | | | • |
| 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. —————————————————————————————————— | • | | | ŀ | |
| c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. | | | 2b | İ | |
| 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 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) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2012? 4b X | | , | | | |
| Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? If "Yes," did it have excess business holdings in 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 Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2012? N/A X | | | 1 | | |
| 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) 1 | 38 | a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time | | | |
| 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) 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 2012? 4b X | | during the year? | | | |
| 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) 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 2012? 4b X | ı | | | | |
| Form 4720, to determine if the foundation had excess business holdings in 2012) 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 2012? 4b X | | | | | |
| 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 2012? 4b 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? 4b X | | • | - | + | 17 |
| had not been removed from jeopardy before the first day of the tax year beginning in 2012? | | | 4a | + | <u>X</u> |
| Had not book form booking belief the site of or the | I | | 16 | | _v |
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| orm 990-PF (2012) ROBERT I. LAPPIN CHARITA | BLE FOUNDATIO | | <u>04-65792</u> | 06 Page <u>6</u> |
|---|--|-------------------|--|---|
| Part VII-B Statements Regarding Activities for Which F | orm 4720 May Be F | Required (continu | ued) | |
| 5a During the year did the foundation pay or incur any amount to: | | | | |
| (1) Carry on propaganda, or otherwise attempt to influence legislation (section | 4945(e))? | Ye | s 🗓 No | |
| (2) Influence the outcome of any specific public election (see section 4955); o | r to carry on, directly or indire | ectly, | | |
| any voter registration drive? | | | 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 | or | (. | |
| the prevention of cruelty to children or animals? | | | s X No | |
| b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und | | n Regulations | N/A 5 | b |
| section 53.4945 or in a current notice regarding disaster assistance (see instru | | | N/A | |
| Organizations relying on a current notice regarding disaster assistance check h | | inod | | |
| c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fr | | | s D No | |
| expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section 53 4945 | | I/A | .a NO | |
| 6a Did the foundation, during the year, receive any funds, directly or indirectly, to | | | | |
| a personal benefit contract? | bay promiumo on | Ye | s X No | |
| b Did the foundation, during the year, pay premiums, directly or indirectly, on a p | ersonal benefit contract? | | · I | ib 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 | | | N/A | 'b |
| Part VIII Information About Officers, Directors, Trust | ees, Foundation Ma | nagers, Highly | / | |
| Paid Employees, and Contractors | | | | |
| 1 List all officers, directors, trustees, foundation managers and their | | (c) Compensation | (d) Contributions to | (a) Eypones |
| (a) Name and address | (b) Title, and average hours per week devoted | (If not paid, | (d) Contributions to employee benefit plans and deferred | (e) Expense account, other |
| | to position | enter -0-) | compensation | allowances |
| ROBERT I. LAPPIN | TRUSTEE | | | |
| 60 LITTLES POINT SWAMPSCOTT, MA 01907 | 10.00 | 0. | 0. | 0. |
| SWAMPSCOII, MA 01907 | 10.00 | · · | 0. | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| 2 Compensation of five highest-paid employees (other than those inc | | , enter "NONE." | (d) Contributions to | (a) Evpance |
| (a) Name and address of each employee paid more than \$50,000 | (b) Title, and average hours per week | (c) Compensation | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
| | devoted to position | 77707 | compensation | allowances |
| DEBORAH COLTIN | EXECUTIVE DIF | | ا م | 0 |
| 18 MANDALAY DRIVE, PEABODY, MA 01960 | 40.00 | 118,847. | 0. | |
| | | | | |
| | | - | | |
| | 1 | | | |
| | | | | |
| | 1 | | | |
| <u> </u> | · · · · · · · · · · · · · · · · · · · | | - | |
| | 1 | | | |
| Total number of other employees paid over \$50,000 | | | > | 0 |
| | | | | |

| | | ge 7 |
|--|-------------------|--------------|
| Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued) | ly | |
| 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 serv | vice (c) Compensa | ition |
| NONE | | |
| | | |
| | | |
| | | _ |
| | | |
| | | |
| | | |
| | | |
| To be a set of others are supplied to the set of section and set of section and section are section and section and section are section and section and section are section and section and section are section and section and section are section and section and section are section and section are section and section ar | • | 0 |
| Total number of others receiving over \$50,000 for professional services Part IX-A Summary of Direct Charitable Activities | | _ |
| List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the | | |
| number of organizations and other beneficiaries served, conferences convened, research papers produced, etc. | Expenses | |
| 1 | | |
| COR CONTROL 12 | 114 20 | |
| SEE STATEMENT 13 | 114,28 | <u> </u> |
| 2 | | |
| SEE STATEMENT 14 | 1,94 | 5. |
| PROGRAMS FOR FAMILIES AND EDUCATORS TEACH ABOUT THE JEWISH | | |
| FAITH, JEWISH RITUALS AND JEWISH LIVING, AND WAYS TO ENRIC | | |
| THE JEWISH CONTENT AT HOME AND IN SCHOOLS. | 42,26 | 4. |
| 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. | Amount | |
| 1 <u>N/A</u> | | |
| | | |
| 2 | | — |
| | | |
| | | |
| All other program-related investments. See instructions. | | |
| 3 | | |
| | | |
| Total Add lines 1 through 3 | • | 0. |

| P | Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign four | ndations, s | ee instructions) |
|----|--|---------------|-------------------|
| 1 | Fair market-value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: | | |
| а | | 1a | 0. |
| b | Average of monthly cash balances | 1b | 84,597. |
| C | Fair market value of all other assets | 1c | 825,581. |
| d | Total (add lines 1a, b, and c) | 1d | 910,178. |
| 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 | 910,178. |
| 4 | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) | 4 | 13,653. |
| 5 | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5 | 896,525. |
| 6 | Minimum investment return Enter 5% of line 5 | 6 | 44,826. |
| Р | Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations check here in and do not complete this part.) | ıd certain | |
| 1 | Minimum investment return from Part X, line 6 | 1 | 44,826. |
| 2a | Tax on investment income for 2012 from Part VI, line 5 | | - |
| b | | | |
| C | | 2c | 961. |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 | 3 | 43,865. |
| 4 | Recoveries of amounts treated as qualifying distributions | 4 | 0. |
| 5 | Add lines 3 and 4 | 5 | 43,865. |
| 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 | 43,865. |
| P | 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 | 331,067. |
| 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: | | |
| а | 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 | 331 <u>,067</u> . |
| 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 | 331,067. |
| | 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 | the section |

| Form 990-PF (2012) ROBERT I. | LAPPIN CHARITA | ABLE FOUNDATION | 04-657 | <u> 9206 Page 9</u> |
|--|------------------|----------------------------|-------------|---------------------------------------|
| Part XIII Undistributed Income (se | ee instructions) | | | |
| , | (a) Corpus | (b) Years prior to 2011 | (c) 2011 | (d) 2012 |
| 1 Distributable amount for 2012 from Part XI, line 7 | | | | 43,865. |
| 2 Undistributed income, if any, as of the end of 2012 | | | | |
| a Enter amount for 2011 only | | | 0. | |
| b Total for prior years: | | | | |
| ,, | | 0. | | |
| 3 Excess distributions carryover, if any, to 2012: | | | | |
| a From 2007 529,081. | | | | |
| b From 2008 738,577. | | | | |
| c From 2009 333,065. | | | | |
| d From 2010 681,690. e From 2011 402,978. | | | | |
| e From 2011 402,978. f Total of lines 3a through e | 2,685,391. | | | |
| 4 Qualifying distributions for 2012 from | 2,003,351. | | | · · · · · · · · · · · · · · · · · · · |
| Part XII, line 4: ►\$ 331,067. | | | | |
| a Applied to 2011, 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 2012 distributable amount | | | | 43,865. |
| e Remaining amount distributed out of corpus | 287,202. | | | |
| 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 | 2,972,593. | | | |
| 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 | | 0. | | |
| amount - see instructions 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 | | | | 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 2007 | | | | |
| not applied on line 5 or line 7 | 529,081. | | | |
| 9 Excess distributions carryover to 2013 | 0 440 540 | | | |
| Subtract lines 7 and 8 from line 6a | 2,443,512. | | | |
| 10 Analysis of line 9: | | | | |
| a Excess from 2008 738,577. b Excess from 2009 333,065. | | | | |
| b Excess from 2009 c Excess from 2010 681,690. | | | | |
| d Excess from 2011 402 978 | | | | |

e Excess from 2012

287,202.

| | | HARITABLE F | | | 79206 Page 10 |
|---|-----------------------------|--------------------------------|------------------------------|--|----------------|
| Part XIV Private Operating F | | - | -A, question 9) | N/A | |
| 1 a If the foundation has received a ruling of | | - | | | |
| foundation, and the ruling is effective fo | | = | ▶ └── | | |
| b Check box to indicate whether the found | | ng foundation described i | | 4942(j)(3) or 49 | 942(j)(5) 1 |
| 2 a Enter the lesser of the adjusted net | Tax year | | Prior 3 years | (4) 0000 | (a) Tatal |
| income from Part I or the minimum | (a) 2012 | (b) 2011 | (c) 2010 | (d) 2009 | (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 | | | | | |
| 3 Complete 3a, b, or c for the | | | - | | |
| alternative test relied upon: | | | | | |
| a "Assets" alternative test - enter: (1) Value of all assets | | | | | |
| ` ' | | | | | |
| (2) Value of assets qualifying under section 4942(j)(3)(B)(i) | | | | | |
| b "Endowment" alternative test - enter | | | | | |
| 2/3 of minimum investment return | | | | | |
| shown in Part X, line 6 for each year | | | | | |
| listed | | | | | |
| c "Support" alternative test - enter: | | | | | |
| Total support other than gross investment income (interest, | | | | | |
| dividends, rents, payments on | | • | | | |
| securities loans (section | | | | | |
| 512(a)(5)), or royalties) | | | | - | |
| (2) Support from general public and 5 or more exempt | | | | | |
| organizations as provided in | | | | | |
| section 4942(j)(3)(B)(III) | | | | | |
| (3) Largest amount of support from | | | | | |
| an exempt organization | | | | | |
| (4) Gross investment income | <u> </u> | | | 1 105 000 | |
| Part XV Supplementary Info | | | it the foundation | nad \$5,000 or m | ore in assets |
| at any time during | . | ructions.) | | | |
| 1 Information Regarding Foundation | - | | | | |
| a List any managers of the foundation wh | | | ributions received by the | foundation before the clo | se of any tax |
| year (but only if they have contributed i | nore man \$5,000). (See s | section 507(a)(2).) | | | |
| ROBERT I. LAPPIN | | | | | |
| b List any managers of the foundation wh | | | (or an equally large porti | on of the ownership of a p | artnership or |
| other entity) of which the foundation ha | is a 10% or greater intere | SL. | | | |
| NONE | | | , | | |
| 2 Information Regarding Contribut | | | | | |
| Check here X if the foundation | | | | | |
| the foundation makes gifts, grants, etc. | , , | | | omplete items 2a, b, c, and | <u>d d</u> |
| a The name, address, and telephone num | iber or e-mail of the perso | on to whom applications s | should be addressed: | | |
| | | | | | |
| h. The form in which confications should | he aubmitted and informs | ation and materials they al | nould include: | | _ |
| b The form in which applications should | Je submilited and imorma | ation and materials they si | iodia include. | | |
| c Any submission deadlines: | | | | | |
| d Any restrictions or limitations on sweet | le euch se hy geographic | al areas, charitable fields | kinds of institutions or | other factors: | |
| d Any restrictions or limitations on award | o, auch as ny geographic | ai ai tas, viiai navie lielūs, | KIIIUO OI IIIOIIUUIIOIIO, UI | omer lactors. | |
| | | | | | |

| | Unrelated b | usiness income | | y section 512, 513, or 514 | (e) |
|--|--|---------------------------------------|--|----------------------------|---------------------------------------|
| er gross amounts unless otherwise indicated. Program service revenue: | (a) Business code | (b) Amount | (C) Exclu- sion code | (d) Amount | Related or exempti function income |
| • | 0000 | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| · | | | | | |
| Fees and contracts from government agencies | _ | | | | |
| Nembership dues and assessments | | | | | |
| nterest on savings and temporary cash | | | | | |
| vestments | | | 14 | 1.889. | |
| ividends and interest from securities | - | | 14 | 1,889. 8,788. | |
| et rental income or (loss) from real estate: | | | † - 1 | 07.003 | |
| Debt-financed property | | · · · · · · · · · · · · · · · · · · · | | | |
| Not debt-financed property | | · · · · · · · · · · · · · · · · · · · | | | · <u> </u> |
| et rental income or (loss) from personal | | | | _ | |
| roperty | | | | | |
| ther investment income | - | | 14 | 14,195. | |
| ain or (loss) from sales of assets other | - | | | 1 = 1 = 3 - | |
| han inventory | | | 18 | 54,534. | |
| et income or (loss) from special events | | | 1 - | 3273324 | ····· |
| ross profit or (loss) from sales of inventory | | | | | |
| Other revenue: | | | | | |
| | | | | | |
| i | | | | | |
| | l i | | | | |
| 1 | i | | | | |
| | | | | | |
| Subtotal, Add columns (b), (d), and (e) | | 0. | , | 79,406. | |
| * | | | • | 13 | 79,4 |
| otal, Add line 12, columns (b), (d), and (e) | nne) | | | | |
| | ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,, | | | urnocco | - |
| worksheet in line 13 instructions to verify calculation | | plishment of E | xempt P | urposes | |
| worksheet in line 13 instructions to verify calculation art XVI-B Relationship of Activities e No. Explain below how each activity for which | ties to the Accon | column (e) of Part XVI- | | | olishment of |
| e No. Explain below how each activity for which | ties to the Accon | column (e) of Part XVI- | | | olishment of |
| worksheet in line 13 instructions to verify calculation art XVI-B Relationship of Activities Relationship of Activities No. Explain below how each activity for which the factor of the control of the c | ties to the Accon | column (e) of Part XVI- | | | plishment of |
| worksheet in line 13 instructions to verify calculation Int XVI-B Relationship of Activity e No. Explain below how each activity for which the following structure Explain below how each activity for which the following structure Explain below how each activity for which The following structure Explain below how each activity for which The following structure Explain below how each activity for which The following structure The following structure Explain below how each activity for which The following structure The following structure Explain below how each activity for which The following structure The foll | ties to the Accon | column (e) of Part XVI- | | | olishment of |
| worksheet in line 13 instructions to verify calculation art XVI-B Relationship of Activities e No. Explain below how each activity for which | ties to the Accon | column (e) of Part XVI- | | | olishment of |
| worksheet in line 13 instructions to verify calculation Int XVI-B Relationship of Activity e No. Explain below how each activity for which the following structure Explain below how each activity for which the following structure Explain below how each activity for which The following structure Explain below how each activity for which The following structure Explain below how each activity for which The following structure The following structure Explain below how each activity for which The following structure The following structure Explain below how each activity for which The following structure The foll | ties to the Accon | column (e) of Part XVI- | | | Dishment of |
| worksheet in line 13 instructions to verify calculation Int XVI-B Relationship of Activity e No. Explain below how each activity for which the following structure Explain below how each activity for which the following structure Explain below how each activity for which The following structure Explain below how each activity for which The following structure Explain below how each activity for which The following structure The following structure Explain below how each activity for which The following structure The following structure Explain below how each activity for which The following structure The foll | ties to the Accon | column (e) of Part XVI- | | | olishment of |
| worksheet in line 13 instructions to verify calculation Int XVI-B Relationship of Activity e No. Explain below how each activity for which the formula of the control | ties to the Accon | column (e) of Part XVI- | | | olishment of |
| worksheet in line 13 instructions to verify calculation Int XVI-B Relationship of Activity e No. Explain below how each activity for which the formula of the control | ties to the Accon | column (e) of Part XVI- | | | plishment of |
| worksheet in line 13 instructions to verify calculation Int XVI-B Relationship of Activity e No. Explain below how each activity for which the formula of the control | ties to the Accon | column (e) of Part XVI- | | | plishment of |
| worksheet in line 13 instructions to verify calculation Int XVI-B Relationship of Activity e No. Explain below how each activity for which the formula of the control | ties to the Accon | column (e) of Part XVI- | | | Dishment of |
| worksheet in line 13 instructions to verify calculation Int XVI-B Relationship of Activity e No. Explain below how each activity for which the following structure Explain below how each activity for which the following structure Explain below how each activity for which The following structure Explain below how each activity for which The following structure Explain below how each activity for which The following structure The following structure Explain below how each activity for which The following structure The following structure Explain below how each activity for which The following structure The foll | ties to the Accon | column (e) of Part XVI- | | | plishment of |
| worksheet in line 13 instructions to verify calculation art XVI-B Relationship of Activities Relationship of Activities No. Explain below how each activity for which the factor of the control of the c | ties to the Accon | column (e) of Part XVI- | | | plishment of |
| worksheet in line 13 instructions to verify calculation art XVI-B Relationship of Activities e No. Explain below how each activity for which | ties to the Accon | column (e) of Part XVI- | | | plishment of |
| worksheet in line 13 instructions to verify calculation. Relationship of Activit e No. Explain below how each activity for which | ties to the Accon | column (e) of Part XVI- | | | Dishment of |

223621 12-05-12

Schedule B (Form 990, 990-EZ, or 990-PF)

Internal Revenue Service

Schedule of Contributors

Attach to Form 990, Form 990-EZ, or Form 990-PF.

OMB No 1545-0047

2012

Name of the organization

Employer identification number

04-6579206 ROBERT I. LAPPIN CHARITABLE FOUNDATION Organization type (check one): Filers of: Section: 501(c)() (enter number) organization Form 990 or 990-EZ 4947(a)(1) nonexempt charitable trust not treated as a private foundation 527 political organization Form 990-PF X 501(c)(3) exempt private foundation 4947(a)(1) nonexempt charitable trust treated as a private foundation 501(c)(3) taxable private foundation Check if your organization is covered by the General Rule or a Special Rule. Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions. General Rule For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor Complete Parts I and II. Special Rules For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II. For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use exclusively for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use exclusively for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose Do not complete any of the parts unless the General Rule applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it must answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on Part I, line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2012)

Employer identification number

ROBERT I. LAPPIN CHARITABLE FOUNDATION

| Part I | Contributors (see instructions). Use duplicate copies of Part I if addition | nal space is needed. | |
|------------|--|-------------------------|---|
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
| 1 | STEVEN ROSENTHAL 40 BARTLETT ST. MARBLEHEAD, MA 01945 | \$10,000. | Person X Payroll Noncash (Complete Part II if there is a noncash contribution.) |
| (a) | (b) | (c) | (d) |
| No2 | Name, address, and ZIP + 4 THE GOLDHIRSH FOUNDATION C/O RINET COMPANY, LLC, 101 FEDERAL ST. BOSTON, MA 02110 | \$ 12,500. | Person X Payroll Noncash (Complete Part II if there is a noncash contribution) |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
| 3 | THE GOLDHIRS LEVI-YELLIN FOUNDATION C/O RINET COMPANY, LLC, 101 FEDERAL ST. BOSTON, MA 02110 | \$ 12,500. | Person X Payroll |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
| 4 | ARTHUR EPSTEIN 14 FOSTER ST. MARBLEHEAD, MA 01945 | \$8,000. | Person X Payroll Noncash (Complete Part II if there is a noncash contribution.) |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
| <u>5</u> | JEWISH FEDERATION OF THE N.S. 39 NORTON ST. SALEM, MA 01970 | \$6,000. | Person X Payroll Noncash (Complete Part II if there is a noncash contribution) |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
| 6 | WILLOW STREET MEDICAL LABORATORY 270 UNION ST. LYNN, MA 01901 | \$5,000. | Person X Payroll Noncash (Complete Part II if there is a noncash contribution.) |

Employer identification number

ROBERT I. LAPPIN CHARITABLE FOUNDATION

| Part ! | Contributors (see instructions). Use duplicate copies of Part I if additional space is needed. | | | | | | |
|------------|--|-------------------------|---|--|--|--|--|
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution | | | | |
| 7 | MORTON RUBERMAN 7480 REXFORD ST. BOCA RATON, FL 33434 | \$5,000. | Person X Payroll | | | | |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution | | | | |
| 8 | ANDREW LAPPIN 630 LINCOLN AVE. GLENCOE, IL 60022 | \$ 93,252. | Person X Payroll | | | | |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution | | | | |
| 9 | PETER LAPPIN 46 NEPTUNE ST. BEVERLY, MA 01915 | \$ <u>156,571.</u> | Person X Payroll Noncash (Complete Part II if there is a noncash contribution.) | | | | |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution | | | | |
| 10 | NANCY LAPPIN 172 BEACON ST. BOSTON, MA 02116 | \$ <u>150,571.</u> | Person X Payroll | | | | |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution | | | | |
| 11 | ROBERT SALTER 52 LITTLE POINT RD. SWAMPSCOTT, MA 01923 | \$5,000. | Person X Payroll | | | | |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution | | | | |
| 12 | GORDON FOUNDATION 14 ELECTRONICS AVE. DANVERS, MA 01923 | \$10,000. | Person X Payroll Noncash (Complete Part II if there is a noncash contribution) | | | | |

Employer identification number

ROBERT I. LAPPIN CHARITABLE FOUNDATION

| Part I | Contributors (see instructions). Use duplicate copies of Part I if additional space is needed. | | | | | | |
|------------|--|----------------------------|--|--|--|--|--|
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution | | | | |
| 13 | HOWARD RICH 289 OCEAN AVE. MARBLEHEAD, MA 01945 | \$\$ | Person X Payroll Noncash (Complete Part II if there is a noncash contribution) | | | | |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution | | | | |
| | | \$ | Person Payroll Noncash (Complete Part II if there is a noncash contribution.) | | | | |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution | | | | |
| | | \$ | Person Payroll Noncash (Complete Part II if there is a noncash contribution) | | | | |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution | | | | |
| | | \$ | Person Payroll Noncash (Complete Part II if there is a noncash contribution) | | | | |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution | | | | |
| | | | Person Payroll Noncash (Complete Part II if there is a noncash contribution.) | | | | |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution | | | | |
| | | \$ | Person Payroll Noncash (Complete Part II of there is a noncash contribution) | | | | |

Employer identification number

ROBERT I. LAPPIN CHARITABLE FOUNDATION

| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (see instructions) | (d) Date received |
|------------------------------|--|--|----------------------|
| | | \$ | |
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (see instructions) | (d) Date received |
| | | \$ | |
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (see instructions) | (d) Date received |
| | | \$ | |
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (see instructions) | (d) Date received |
| | | | |
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (see instructions) | (d) Date received |
| _ _ | | | |
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (see instructions) | (d) Date received |
| | | | |

 $\frac{\text{Schedule B (Form 990, 990-EZ, or 990-PF) (2012)}}{\text{Name of organization}}$

Employer identification number

| BERT I | . LAPPIN CHARITABLE I | FOUNDATION | 04-6579206 |
|------------------------------------|---|---|---|
| t | Exclusively religious, charitable, etc., indiviver. Complete columns (a) through (e) and the he total of exclusively religious, charitable, etc. Use duplicate copies of Part III if additionate. | ., contributions of \$1,000 or less for | (7), (8), or (10) organizations that total more than \$1,000 for the completing Part III, enter the year. (Enter this information once) |
| No. om art I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
| _ _ | | | |
| | | (e) Transfer of gift | 1 |
| | Transferee's name, address, an | nd ZIP + 4 | Relationship of transferor to transferee |
| No. | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
| art I | | | |
| | | | |
| | | (e) Transfer of gift | t |
| | Transferee's name, address, ar | nd ZIP + 4 | Relationship of transferor to transferee |
| No. om art I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
| | | | |
| | Transferee's name, address, ar | (e) Transfer of gif | Relationship of transferor to transferee |
| | | | |
|) No. rom art I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
| $-\begin{vmatrix} - \end{vmatrix}$ | | | |
| | | (e) Transfer of gif | Pt . |
| | Transferee's name, address, an | nd ZIP + 4 | Relationship of transferor to transferee |
| | | | |

| Part IV Capital Gains and Los | sses for Tax on Investment Income | | | | |
|---|--|--|--|--|----------------------------------|
| (a) List and | describe the kind(s) of property solo ick warehouse; or common stock, 20 | | (b) How acquired P - Purchase D - Donation | (c) Date acquired (mo., day, yr.) | (d) Date sold (mo., day, yr.) |
| 1a STAR GROWTH EN | TERPRISE | | P | | 12/31/12 |
| b STAR VENTURES I | NO V | | P | | 12/31/12 |
| c STAR SEED ENTER | RPRISE | | P | | 12/31/12 |
| d STAR GROWTH EN' | TERPRISE | | P | | 12/31/12 |
| e STAR VENTURES I | NO IX | | P | | 12/31/12 |
| f ARBOR PLACE LP | | | P | | 12/31/12 |
| 9 ARBOR PLACE LP | | | P | | 12/31/12 |
| h ARBOR PLACE LP | - 1256 LOSS | | P | | 12/31/12 |
| _ ARBOR PLACE LP | - 1256 LOSS | | P | | 12/31/12 |
| _ ARBOR PLACE LP | - 1231 GAIN | | P | | 12/31/12 |
| k | | | | | |
| _1 | | | | | |
| m | | | | | |
| n | | | | | |
| 0 | | | | | |
| (e) Gross sales price | (f) Depreciation allowed (or allowable) | (g) Cost or other basis plus expense of sale | |) Gain or (loss) blus (f) minus (g) | |
| a | | 950. | | | -950. |
| b | | 7,206. | | | -7,206. |
| c 30,098. | | | | | 30,098. |
| d | | 12,798. | | | -12,798. |
| e 23,920. | | 30,068. | | | -6,148. |
| 16,355. | | | | | 16,355. |
| g 3,648. | | | | | 3,648. |
| h | | 17. | | | -17. |
| ı | | 26. | | | -26. |
| 198. | | | | | 198. |
| k | | | | | |
| 1 | | | | | |
| m | | | | | |
| n | | | | | |
| 0 | | | | | |
| Complete only for assets showin | g gain in column (h) and owned by t | he foundation on 12/31/69 | (I) Los | sses (from col. (h)) | |
| (i) F.M.V. as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of col. (I) over col. (I), If any | Gains (excess but r | of col. (h) gain ove not less than "-0-") | r col. (k), |
| a | | | | | -950. |
| b | | | | | -7,206. |
| C | | | | | 30,098. |
| d | | | | | -12,798. |
| е | | | | | -6,148. |
| f | | | | | 16,355. |
| g | | | | | 3,648. |
| h | | | | | -17. |
| 1 | | | | | -26. |
| 1 | | | | | 198. |
| k | | | | | |
| 1 | | | | | |
| m | | | | | |
| n | | | | | |
| 0 | | | | | |
| 2 Capital gain net income or (net cap | pital loss) { If gain, also enter for if (loss), enter for for its formula in the | ın Part I, line 7 -" ın Part I, line 7 } | | | 23,154. |
| 3 Net short-term capital gain or (loss if gain, also enter in Part I, line 8, o | s) as defined in sections 1222(5) and column (c). | . | | | |
| If (loss), enter "-0-" in Part I, line 8 | | | | N/A | |

| FORM 990-PF | GAIN OR (LOSS) | FROM SALE | OF | ASSETS | STA | ATEMENT | 1 |
|-----------------------------|-------------------------------|------------------------|----|-------------------|------------------|------------------|-----|
| (A) DESCRIPTION OF PROPERS | гу | | | MANNER CQUIRED | DATE ACQUIRED | DATE SO |)LD |
| STAR GROWTH ENTERPRISE | E | | PU | RCHASED | | 12/31/ | 12 |
| (B) GROSS SALES PRICE | (C) COST OR OTHER BASIS | (D) EXPENSE SALE | OF | (E) DEPRE | C. GAII | (F) N OR LOSS | 3 |
| 0 | . 950 | • | 0. | | 0. | -95 | 50. |
| (A) DESCRIPTION OF PROPER' | ГҮ | | | MANNER CQUIRED | DATE ACQUIRED | DATE SO | OLD |
| STAR VENTURES NO V | | | PU | RCHASED | | 12/31/ | /12 |
| (B) GROSS SALES PRICE | (C) COST OR OTHER BASIS | (D) EXPENSE SALE | OF | (E) DEPRE | C. GAI | (F) N OR LOSS | 3 |
| 0 | 6,156 | • | 0. | | 0. | -6,15 | 56. |
| (A) DESCRIPTION OF PROPER | ГY | | | MANNER CQUIRED | DATE ACQUIRED | DATE SO | OLD |
| STAR SEED ENTERPRISE | | | PU | RCHASED | | 12/31 | /12 |
| (B) GROSS SALES PRICE | (C) COST OR OTHER BASIS | (D) EXPENSE SALE | | (E) DEPRE | C. GAI | (F) N OR LOSS | S |
| 30,098 | | | 0. | | 0. | 30,09 | 98. |

| (A) DESCRIPTION OF PROPERTY | | | | MANNER CQUIRED | DATE ACQUIRE | D DATE SOLD |
|-----------------------------|-------------------------------|------------------------|-----|-------------------|-----------------|-------------------|
| STAR GROWTH ENTERPRISE | | | PUI | RCHASED | | 12/31/12 |
| (B) GROSS SALES PRICE | (C) COST OR OTHER BASIS | (D) EXPENSE SALE | OF | (E) DEPRE | C. GA | (F) IN OR LOSS |
| 0. | 12,536. | | 0. | | 0. | -12,536. |
| (A) DESCRIPTION OF PROPERTY | | | | MANNER CQUIRED | DATE ACQUIRE | D DATE SOLD |
| STAR VENTURES NO IX | _ | | PUI | RCHASED | | 12/31/12 |
| (B) GROSS SALES PRICE | (C) COST OR OTHER BASIS | (D) EXPENSE SALE | OF | (E) | C. GA | (F) IN OR LOSS |
| 23,920. | 0. | | 0. | | 0. | 23,920. |
| (A) DESCRIPTION OF PROPERTY | | | | MANNER CQUIRED | DATE ACQUIRE | D DATE SOLD |
| ARBOR PLACE LP | _ | | PUI | RCHASED | | 12/31/12 |
| (B) GROSS SALES PRICE | (C) COST OR OTHER BASIS | (D) EXPENSE SALE | OF | (E) | C. GA | (F) |
| 16,355. | 0. | | 0. | | 0. | 16,355. |
| (A) DESCRIPTION OF PROPERTY | | | | MANNER CQUIRED | DATE ACQUIRE | D DATE SOLD |
| ARBOR PLACE LP | _ | | PU | RCHASED | | 12/31/12 |
| (B) GROSS | (C) COST OR | (D) EXPENSE | OF | (E) | C C3 | (F) |
| SALES PRICE | OTHER BASIS | SALE | | DEPRE | | IN OR LOSS |
| 3,648. | 0. | | 0. | | 0. | 3,648. |

| (A) DESCRIPTION OF PROPERTY | | | | ANNER QUIRED | | | DATE SOLD |
|--|-------------------------------|------------------------|-----|------------------------|----|------------|-------------|
| ARBOR PLACE LP - 1256 L | oss | | PUR | CHASED | | | 12/31/12 |
| (B) GROSS SALES PRICE | (C) COST OR OTHER BASIS | (D) EXPENSE SALE | OF | (E) DEPRE | | | (F) |
| 0. | 17. | | 0. | | 0. | | -17. |
| (A) DESCRIPTION OF PROPERTY | _ | | AC | ANNER QUIRED | | IRED | DATE SOLD |
| ARBOR PLACE LP - 1256 L (B) GROSS SALES PRICE | (C) COST OR | (D) EXPENSE SALE | OF | CHASED (E) DEPRE | | | (F) OR LOSS |
| 0. | 26. | | 0. | | 0. | | -26. |
| (A) DESCRIPTION OF PROPERTY | | | | ANNER QUIRED | | TE URED | DATE SOLD |
| ARBOR PLACE LP - 1231 G | AIN | | PUR | CHASED | | | 12/31/12 |
| (B) GROSS SALES PRICE | (C) COST OR OTHER BASIS | (D) EXPENSE SALE | OF | (E) | | GAIN | (F) |
| 198. | 0. | | 0. | | 0. | | 198. |
| CAPITAL GAINS DIVIDENDS | FROM PART IV | | | | | | 0. |
| | | | | | | | |

| FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS | STATEMENT | 2 |
|--|-----------|------------|
| SOURCE | AMOUNT | |
| EASTERN BANK INTEREST INCOME FROM PARTNERSHIP INTERESTS | 1,8 | 42. 47. |
| TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A | 1,8 | 89. |

| FORM 990-PF DIVIDENDS AND | INTEREST FROM | SECURITIES | STATEMENT 3 |
|--|---------------|----------------------------|----------------------|
| SOURCE | GROSS AMOUNT | CAPITAL GAINS DIVIDENDS | COLUMN (A) AMOUNT |
| DIVIDEND INCOME FROM INVESTMENT PARTNERSHIPS | 8,788. | 0. | 8,788. |
| TOTAL TO FM 990-PF, PART I, LN 4 | 8,788. | 0. | 8,788. |

| FORM 990-PF OTHE | R INCOME | | STATEMENT 4 |
|---------------------------------------|-----------------------------|-----------------------------------|-------------------------------|
| DESCRIPTION | (A) REVENUE PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME |
| INVESTMENT PARTNERSHIP INCOME | 14,195. | 14,195 | • |
| TOTAL TO FORM 990-PF, PART I, LINE 11 | 14,195. | 14,195 | • |

| FORM 990-PF | LEGAL | FEES | STATEMENT 5 | | |
|----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|--|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES | |
| LEGAL FEES | 4,583. | 0. | | 0. | |
| TO FM 990-PF, PG 1, LN 16A | 4,583. | 0. | | 0. | |

| FORM 990-PF | ACCOUNTING FEES | | | STATEMENT 6 | |
|------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|--|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES | |
| ACCOUNTING FEES | 3,472. | 0. | | 0. | |
| TO FORM 990-PF, PG 1, LN 16B | 3,472. | 0. | | 0. | |

| FORM 990-PF OTHER PROFESSIONAL FEES | | | S | STATEMENT 7 | | |
|-------------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|--|--|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES | | |
| CONSULTING FEES | 36,505. | 0. | | 0. | | |
| TO FORM 990-PF, PG 1, LN 16C | 36,505. | 0. | | 0. | | |

| FORM 990-PF | TAXES | | | STATEMENT 8 | | |
|-----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|--|--|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES | | |
| PAYROLL TAXES | 15,023. | 0. | | 15,023. | | |
| TO FORM 990-PF, PG 1, LN 18 | 15,023. | 0. | | 15,023. | | |

| FORM 990-PF | OTHER E | XPENSES | S | TATEMENT 9 |
|---|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
| PROGRAM DEVELOPMENT EXPENSES ADMINISTRATIVE EXPENSE MISCELLANEOUS | 71,239. 18,324. 249. | | | 71,239. 18,324. 249. |
| TO FORM 990-PF, PG 1, LN 23 | 89,812. | 0. | | 89,812. |

| FORM 990-PF DEPRECIATION | OF ASSETS NO | r HELD FOR IN | ESTMENT | STATEMENT 10 |
|-----------------------------------|--------------------------|-----------------------------|------------------|----------------------|
| DESCRIPTION | COST OR OTHER BASIS | ACCUMULATED DEPRECIATION | BOOK VALUE | FAIR MARKET VALUE |
| OFFICE EQUIPMENT OFFICE EQUIPMENT | 2,423. 563. 1,768. | 2,423. 563. 916. | 0. 0. 852. | . 0. |
| TO 990-PF, PART II, LN 14 | 4,754. | 3,902. | 852. | 852. |

| FORM 990-PF | OTHER ASSETS | STATEMENT 11 | |
|---|---------------|--------------|-------------|
| DESCRIPTION | BEGINNING OF | END OF YEAR | FAIR MARKET |
| | YR BOOK VALUE | BOOK VALUE | VALUE |
| SVE STAR VENTURES ENT NO V STAR SEED ENTERPRISE STAR GROWTH ENTERPRISE SVE STAR VENTURES ENT NO IX ARBOR PLACE LP | 1,114. | -5,596. | 8,883. |
| | -73,731. | -67,257. | 12,634. |
| | 18,880. | 5,018. | 20,992. |
| | 103,281. | 95,704. | 42,693. |
| | 562,948. | 902,030. | 902,030. |
| TO FORM 990-PF, PART II, LINE 15 | 612,492. | 929,899. | 987,232. |

| FORM 990-PF OTHER LIABIL | ITIES S | STATEMENT 12 | |
|---|-------------------------|--------------------------|--|
| DESCRIPTION | BOY AMOUNT F | TOUNAMA YOU | |
| ACCRUED PAYROLL ACCRUED FEDERAL & STATE TAX DUE TO SHETLAND PROPERTIES OF SALEM | 3,097. 89. 2,641. | 3,856. 180. 2,727. | |
| TOTAL TO FORM 990-PF, PART II, LINE 22 | 5,827. | 6,763. | |

FORM 990-PF

SUMMARY OF DIRECT CHARITABLE ACTIVITIES

STATEMENT

13

ACTIVITY ONE

YOUTH TO ISRAEL, AN EDUCATIONAL PROGRAM FOR JEWISH TEENS AND THEIR PARENTS, TEACHES ABOUT ISRAEL, INCLUDING RELIGION, CULTURE, HISTORY, AND PEOPLE. YOUTH TO ISRAEL INCLUDES A COMMUNITY TRIP TO ISRAEL FOR TEENS IN JULY.

EXPENSES

TO FORM 990-PF, PART IX-A, LINE 1

114,283.

FORM 990-PF

SUMMARY OF DIRECT CHARITABLE ACTIVITIES

STATEMENT

14

ACTIVITY TWO

INTERFAITH OUTREACH INCLUDES INTRODUCTION TO JUDAISM, A 25-WEEK COURSE FOR PEOPLE PREPARING FOR CONVERSION TO JUDAISM AS WELL AS FOR OTHERS WHO WANT TO EXPLORE JUDAISM, AND ADDITIONAL PROGRAMS THAT TEACH ABOUT THE JEWISH FAITH.

EXPENSES

TO FORM 990-PF, PART IX-A, LINE 2

1,945.

Form **8868**

(Rev January 2013)

Department of the Treasury internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

► File a separate application for each return.

OMB No. 1545-1709

| | | | | | | |
|--|---|--------------|---|---------------|---------------------------------------|-------------|
| If you | are filing for an Automatic 3-Month Extension, complet | te only Pa | rt I and check this box | | | ► X |
| If you | are filing for an Additional (Not Automatic) 3-Month Ext | tension, c | omplete only Part II (on page 2 of t | this form). | | |
| Do not | complete Part II unless you have already been granted a | in automa | tic 3-month extension on a previous | ly filed Fo | rm 8868 | |
| Electro | nic filing (e-file). You can electronically file Form 8868 if y | ou need a | 3-month automatic extension of tin | ne to file (6 | months for a cor | poration |
| require | d to file Form 990-T), or an additional (not automatic) 3-mor | nth extens | ion of time. You can electronically fi | le Form 88 | 368 to request an | extension |
| of time | to file any of the forms listed in Part I or Part II with the exc | eption of | Form 8870, Information Return for 1 | ransfers / | Associated With C | ertain |
| Persona | al Benefit Contracts, which must be sent to the IRS in pap | er format | (see instructions). For more details o | n the elec | tronic filing of this | form, |
| visıt wu | w.irs gov/efile and click on e-file for Chanties & Nonprofits | | | | | |
| Part | I. Automatic 3-Month Extension of Time | . Only s | ubmit original (no copies ne | eded). | | |
| A corpo | pration required to file Form 990-T and requesting an auton | natic 6-mo | onth extension - check this box and | complete | | |
| Part I o | niy | | | | | |
| All othe | r corporations (including 1120-C filers), partnerships, REM | ICs, and ti | rusts must use Form 7004 to reques | t an exten | sion of time | |
| to file ın | ncome tax returns. | | | | | |
| Type or | Name of exempt organization or other filer, see instru | ctions. | | Employe | yer identification number (EIN) or | |
| print | | | | | | . , |
| • | ROBERT I. LAPPIN CHARITABLE | FOU | NDATION | | 04-65792 | 06 |
| File by the due date t | Number stock and some success on Karp O have a | | | Social se | curity number (SS | |
| filing your | 29 CONGRESS ST. PO BOX 98 | | | | , | • |
| return Se instruction | | | ress, see instructions. | | | |
| | SALEM, MA 01970 | | , | | | |
| | Diametry and Varying | | | | | |
| Enter th | ne Return code for the return that this application is for (file | a senara | te application for each return) | | | 0 4 |
| | to Hotalii oodo for the fotalii that the appheatorne for the | a copula | to application for back retaining | | | |
| Applica | ntion | Return | Application | | | Return |
| | | Code | is For | | | |
| Is For | 90 or Form 900 F7 | 01 | | | | Code |
| | 90 or Form 990-EZ | 02 | Form 990-T (corporation) | | · · · · · · · · · · · · · · · · · · · | 07 |
| Form 9 | | | Form 1041-A | | - | 08 |
| | 720 (individual) | 03 | Form 4720 | _ | | 09 |
| Form 9 | | 04 | Form 5227 | | | 10 |
| | 90-T (sec 401(a) or 408(a) trust) | 05 | Form 6069 | | | 11 |
| Form 9 | 90-T (trust other than above) | 06 | Form 8870 | | | 12 |
| | ROBERT I. LAPP | | 202 01070 | | | |
| | books are in the care of PO BOX 986 - SI | <u>ALEM,</u> | | | | |
| | phone No. ► <u>978-744-0556</u> | | FAX No | | | |
| | e organization does not have an office or place of business | | | | | - |
| | s is for a Group Return, enter the organization's four digit | - | •——— | | | |
| box 🕨 | | | | | ers the extension | is for. |
| 1 1 | request an automatic 3-month (6 months for a corporation | • | • | | | |
| _ | AUGUST 15, 2013 , to file the exemp | t organiza | tion return for the organization name | ed above. | The extension | |
| | for the organization's return for: | | | | | |
| • | ► X calendar year 2012 or | | | | | ' |
| Þ | tax year beginning | , an | d ending | | _ · | |
| | | | | | | |
| 2 If | the tax year entered in line 1 is for less than 12 months, o | heck reas | on: Initial return! | Final retur | n | |
| l | Change in accounting period | | | | | |
| | | | | ,, | | |
| 3a If | this application is for Form 990-BL, 990-PF, 990-T, 4720, | or 6069, e | nter the tentative tax, less any | | | |
| nonrefundable credits. See instructions | | | | | \$ | 2,000. |
| b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and | | | | | | |
| е | stimated tax payments made. Include any prior year overp | oayment a | llowed as a credit. | 3b | \$ | 0. |
| c B | alance due. Subtract line 3b from line 3a. Include your pa | yment wit | th this form, if required, | | | |
| | y using EFTPS (Electronic Federal Tax Payment System). | • | · · · · · | 3c | s | 2,000. |
| | n. If you are going to make an electronic fund withdrawal v | | | | EO for payment in | |
| LHA | For Privacy Act and Paperwork Reduction Act Notice, | | · · · · · · · · · · · · · · · · · · · | | | Rev 1-2013) |
| | | | | | \ | / |

| Form 8868 (Rev 1-2013) | | | | | Page 2 |
|--|--|--|--------------|---|---------------|
| If you are filing for an Additional (Not Automatic) 3-Month Ext | tension, c | complete only Part II and check the | s box | | X |
| Note. Only complete Part II if you have already been granted an a | | - | | 8868. | |
| • If you are filing for an Automatic 3-Month Extension, complet | te only Pa | rt I (on page 1). | | | |
| Part II Additional (Not Automatic) 3-Month E | xtensio | n of Time. Only file the origin | nal (no c | opies needed |). |
| | | Enter filer's | identifyir | ng number, see i | nstructions |
| Type or Name of exempt organization or other filer, see instruc | pe or Name of exempt organization or other filer, see instructions | | | r identification nui | mber (EIN) or |
| print | | | | | |
| File by the ROBERT I. LAPPIN CHARITABLE | FOUN | DATION | <u> </u> | 04-6579206 | |
| due date for Number, street, and room or suite no. If a P.O. box, so | ee instruc | tions. | Social se | Social security number (SSN) | |
| return See 29 CONGRESS ST. PO BOX 986 | 5 | | l | | |
| City, town or post office, state, and ZIP code. For a fo | oreign add | ress, see instructions. | | | |
| SALEM, MA 01970 | | | | | |
| | | | | | |
| Enter the Return code for the return that this application is for (file | a separa | te application for each return) | | | 0 4 |
| • | r · · · · · · · · | | | | |
| Application | Return | Application | | | Return |
| Is For | Code | Is For | | 161 (11 | Code |
| Form 990 or Form 990-EZ | 01 | R 1 1 1 1 | • • | 建超知 實 | 1 1 1 |
| Form 990-BL | 02 | Form 1041-A | | - · · · · · · · · · · · · · · · · · · · | 08 |
| Form 4720 (individual) | 03 | Form 4720 | | · · <u> · · · · · · · · · · · · · ·</u> | 09 |
| Form 990-PF | 04 | Form 5227 | | | 10 |
| Form 990-T (sec. 401(a) or 408(a) trust) | 05 | Form 6069 | | | 11 |
| Form 990-T (trust other than above) | 06 | Form 8870 | | | 12 |
| STOP! Do not complete Part II if you were not already granted | | natic 3-month extension on a pre- | viously file | ed Form 8868. | |
| ROBERT I. LAPPI | | | | | |
| • The books are in the care of ▶ PO BOX 986 - SI | ALEM, | | | | |
| Telephone No. ➤ <u>978-744-0556</u> | | FAX No ▶ | | | 1 |
| If the organization does not have an office or place of business | | | | 🕨 | - |
| If this is for a Group Return, enter the organization's four digit | • | | | | |
| box ▶ . If it is for part of the group, check this box ▶ | | | f all memb | ers the extension | ıs for. |
| 4 I request an additional 3-month extension of time until | NOVEM. | | | | |
| 5 For calendar year 2012, or other tax year beginning | | , and endir | | | · |
| 6 If the tax year entered in line 5 is for less than 12 months, c | heck reas | on: Linitial return | Final i | return | |
| Change in accounting period | - | | | | |
| 7 State in detail why you need the extension | ~ > mtrm | D MILE TATEONA MICAN | 220117 | | |
| ADDITIONAL TIME IS NEEDED TO | JATHE! | K THE INFORMATION | KEOUT | RED TO F | LLE A |
| COMPLETE AND ACCURATE RETURN. | | | | | |
| - KILL - L. C. E 000 DI - 000 DE - 000 T. (700 | | | | | |
| 8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or | or 6069, e | nter the tentative tax, less any | | | 2 000 |
| nonrefundable credits. See instructions. | | | 8a | \$ | 2,000. |
| b If this application is for Form 990-PF, 990-T, 4720, or 6069, | - | | İ | | |
| tax payments made include any prior year overpayment all | iowed as a | a credit and any amount paid | <u>-</u> | | 2 000 |
| previously with Form 8868. | | | 8b_ | \$ | 2,000. |
| c Balance due. Subtract line 8b from line 8a. Include your pa | • | th this form, if required, by using | | | 0 |
| EFTPS (Electronic Federal Tax Payment System). See instru | | st be completed for Part II | 8c | \$ | 0. |
| —————————————————————————————————————— | | - | - | | d balas |
| Under penalties of perjury, I declare that I have examined this form, includ it is true, correct, and complete, and that I am authorized to prepare this form. | my accomp orm. | panying scriedules and statements, and t | o the dest c | or my knowleage and | ı Dellet, |
| | PRUST: | PT (200 | Det | - a/a// | |
| Signature Title T | INUST | EE CFA | Date | ► 7/31/13 | (Day 1.0010) |
| , | | | | rorm 8868 | (Rev 1-2013) |