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

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

OMB No 1545-0052

**2012**

Open to public inspection

For calendar year 2012 or tax year beginning

, and ending

Name of foundation <b>MERCK FAMILY FUND</b>		A Employer identification number <b>22-6063382</b>						
Number and street (or P.O. box number if mail is not delivered to street address) <b>95 ELIOT STREET, SUITE 2</b>	Room/suite	B Telephone number <b>(617) 696-3580</b>						
City or town, state, and ZIP code <b>MILTON, MA 02186</b>		C If exemption application is pending, check here <input type="checkbox"/>						
G Check all that apply: <table style="display:inline-table; vertical-align:top;"> <tr><td><input type="checkbox"/> Initial return</td><td><input type="checkbox"/> Initial return of a former public charity</td></tr> <tr><td><input type="checkbox"/> Final return</td><td><input type="checkbox"/> Amended return</td></tr> <tr><td><input type="checkbox"/> Address change</td><td><input type="checkbox"/> Name change</td></tr> </table>		<input type="checkbox"/> Initial return	<input type="checkbox"/> Initial return of a former public charity	<input type="checkbox"/> Final return	<input type="checkbox"/> Amended return	<input type="checkbox"/> Address change	<input type="checkbox"/> Name change	D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
<input type="checkbox"/> Initial return	<input type="checkbox"/> Initial return of a former public charity							
<input type="checkbox"/> Final return	<input type="checkbox"/> Amended return							
<input type="checkbox"/> Address change	<input type="checkbox"/> Name change							
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>						
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <b>\$ 51,239,593.</b>	J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>						

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received	20,500.			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	9,609.	9,609.		STATEMENT 1
	4 Dividends and interest from securities	1,087,659.	1,100,011.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	2,918,065.			
	b Gross sales price for all assets on line 6a <b>45,776,905.</b>				
	7 Capital gain net income (from Part IV, line 2)		2,918,065.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income		<31,205.>		STATEMENT 3	
12 Total. Add lines 1 through 11	4,035,833.	3,996,480.	0.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	223,957.	11,198.	0.	212,759.
	14 Other employee salaries and wages	102,758.	7,930.	0.	94,828.
	15 Pension plans, employee benefits	40,511.	3,252.	0.	37,259.
	16a Legal fees				
	b Accounting fees	15,200.	0.	0.	15,200.
	c Other professional fees	453,081.	624,406.	0.	0.
	17 Interest				
	18 Taxes	172,599.	1,255.	0.	16,830.
	19 Depreciation and depletion	6,162.	0.	0.	
	20 Occupancy	28,164.	0.	0.	28,164.
	21 Travel, conferences, and meetings	13,780.	0.	0.	13,780.
	22 Printing and publications	4,927.	0.	0.	4,927.
	23 Other expenses	169,789.	0.	0.	166,639.
	24 Total operating and administrative expenses. Add lines 13 through 23	1,230,928.	648,041.	0.	590,386.
	25 Contributions, gifts, grants paid	2,728,083.			2,603,533.
26 Total expenses and disbursements. Add lines 24 and 25	3,959,011.	648,041.	0.	3,193,919.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	76,822.				
b Net investment income (if negative, enter -0-)		3,348,439.			
c Adjusted net income (if negative, enter -0-)			0.		

2

Part II Balance Sheets		Beginning of year	End of year	
			(a) Book Value	(b) Book Value
Assets	1 Cash - non-interest-bearing	295,074.	268,984.	268,984.
	2 Savings and temporary cash investments	1,682,610.	1,720,583.	1,720,583.
	3 Accounts receivable ▶ Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶ Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶ Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	9,339.	6,189.	6,189.
	10a Investments - U.S. and state government obligations STMT 8	3,263,644.	3,006,705.	3,006,705.
	b Investments - corporate stock STMT 9	29,580,999.	30,404,860.	30,404,860.
	c Investments - corporate bonds STMT 10	5,722,696.	5,504,689.	5,504,689.
	11 Investments - land, buildings, and equipment basis ▶ Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 11	7,672,022.	10,137,547.	10,137,547.
Liabilities	14 Land, buildings, and equipment: basis ▶ STMT 12 30,440. Less: accumulated depreciation STMT 12 ▶ 25,344.	10,536.	5,096.	5,096.
	15 Other assets (describe ▶ STATEMENT 13)	238,151.	184,940.	184,940.
	16 Total assets (to be completed by all filers)	48,475,071.	51,239,593.	51,239,593.
	17 Accounts payable and accrued expenses	18,433.	40,067.	
	18 Grants payable	530,000.	654,550.	
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ STATEMENT 14)	78,399.	125,300.	
	23 Total liabilities (add lines 17 through 22)	626,832.	819,917.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	47,838,239.	50,419,676.	
	25 Temporarily restricted	10,000.	0.	
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances	47,848,239.	50,419,676.	
	31 Total liabilities and net assets/fund balances	48,475,071.	51,239,593.	

## Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	47,848,239.
2 Enter amount from Part I, line 27a	2	76,822.
3 Other increases not included in line 2 (itemize) ▶ NET UNREALIZED GAIN	3	2,494,615.
4 Add lines 1, 2, and 3	4	50,419,676.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	50,419,676.

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1a VARIOUS INVESTMENTS</b>		<b>P</b>	<b>01/01/12</b>	<b>12/31/12</b>
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
<b>a 45,776,905.</b>		<b>42,858,840.</b>	<b>2,918,065.</b>
b			
c			
d			
e			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
<b>a</b>			<b>2,918,065.</b>
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7       }	2	2,918,065.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2011	3,397,107.	51,886,795.	.065472
2010	3,769,039.	51,769,826.	.072804
2009	4,099,639.	46,329,874.	.088488
2008	4,580,628.	57,390,265.	.079815
2007	4,107,807.	70,062,491.	.058631

2 Total of line 1, column (d)	2	.365210
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.073042
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	49,781,403.
5 Multiply line 4 by line 3	5	3,636,133.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	33,484.
7 Add lines 5 and 6	7	3,669,617.
8 Enter qualifying distributions from Part XII, line 4	8	3,235,058.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	66,969.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	66,969.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	66,969.
6 Credits/Payments:			
a 2012 estimated tax payments and 2011 overpayment credited to 2012		6a	107,000.
b Exempt foreign organizations - tax withheld at source		6b	
c Tax paid with application for extension of time to file (Form 8868)		6c	
d Backup withholding erroneously withheld		6d	
7 Total credits and payments. Add lines 6a through 6d		7	107,000.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached		8	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		10	40,031.
11 Enter the amount of line 10 to be: Credited to 2013 estimated tax <input type="checkbox"/> 40,031. Refunded <input type="checkbox"/>		11	0.

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XIV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <u>MA</u>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

**Part VII-A Statements Regarding Activities** (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address ► <b>MERCKFF.ORG</b>				
14	The books are in care of ► <b>THE MERCK FAMILY FUND</b>	Telephone no. ►	<b>617-696-3580</b>	
	Located at ► <b>95 ELIOT STREET, SUITE 2, MILTON, MA</b>	ZIP+4 ►	<b>02186</b>	
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A	
16	At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►			X

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	N/A	
	Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>	1b	
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?	1c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	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. ► _____, _____, _____	2b	
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If "Yes," did it have excess business holdings in 2012 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2012)	N/A	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	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

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

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

N/A

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

N/A

☐ Yes ☐ No

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

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

If "Yes" to 6b, file Form 8870

**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

**7b****Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 15		169,533.	54,424.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JAMES MAGUIRE 95 ELIOT STREET, MILTON, MA 02186	DIR. OF GRANTS 40.00	MGMT/INVEST ACCOUNT I 79,300.	32,525.	0.

**Total** number of other employees paid over \$50,000

▶ 0

Form 990-PF (2012)

**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
PINNACLE ASSOCIATES, LTD - 335 MADISON AVENUE, 11TH FLOOR, NEW YORK, NY 10017	PORTFOLIO MANAGER	137,847.
FEDERAL STREET ADVISORS - 50 FEDERAL STREET, 3RD 84 STATE STREET, SUITE 1000, BOSTON, BOSTON COMMON ASSET MANAGEMENT	PORTFOLIO MANAGER	106,250.
84 STATE STREET, SUITE 1000, BOSTON, MA 02109	PORTFOLIO MANAGER	67,318.
RUTH GOLDMAN		
95 ELIOT STREET, SUITE 2, MILTON, MA 02186	PROGRAM CONSULTANT	65,000.
CAPITAL GUARDIAN - 630 FIFTH AVENUE, 36TH FLOOR, NEW YORK, NY 10111	PORTFOLIO MANAGER	59,805.
Total number of others receiving over \$50,000 for professional services		0

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

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 AWARD CHARITABLE GRANTS THAT BENEFIT THE NATURAL ENVIRONMENT AND SOCIALLY/ECONOMICALLY DISADVANTAGED PERSONS. 76 GRANTS WERE PAID IN 2012.	2,728,083.
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 SEE STATEMENT 16	40,000.
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	40,000.



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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	47,759,744.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	2,779,751.
<b>c</b>	Fair market value of all other assets	<b>1c</b>	0.
<b>d</b>	Total (add lines 1a, b, and c)	<b>1d</b>	50,539,495.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	0.
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0.
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	50,539,495.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	758,092.
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	49,781,403.
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	2,489,070.

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

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	2,489,070.
<b>2a</b>	Tax on investment income for 2012 from Part VI, line 5	<b>2a</b>	66,969.
<b>b</b>	Income tax for 2012. (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	66,969.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	2,422,101.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	0.
<b>5</b>	Add lines 3 and 4	<b>5</b>	2,422,101.
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	0.
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	2,422,101.

**Part XII** Qualifying Distributions (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	3,193,919.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	40,000.
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	1,139.
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	3,235,058.
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	<b>5</b>	0.
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	3,235,058.

**Note.** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

**Part XIII** Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2011	(c) 2011	(d) 2012
1 Distributable amount for 2012 from Part XI, line 7				2,422,101.
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	598,420.			
b From 2008	1,721,835.			
c From 2009	1,796,975.			
d From 2010	1,229,146.			
e From 2011	837,157.			
f Total of lines 3a through e	6,183,533.			
4 Qualifying distributions for 2012 from Part XII, line 4: ► \$ 3,235,058.				
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				2,422,101.
e Remaining amount distributed out of corpus	812,957.			
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:	6,996,490.			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 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	598,420.			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a	6,398,070.			
10 Analysis of line 9:				
a Excess from 2008	1,721,835.			
b Excess from 2009	1,796,975.			
c Excess from 2010	1,229,146.			
d Excess from 2011	837,157.			
e Excess from 2012	812,957.			





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

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue:					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	9,609.	
4 Dividends and interest from securities			14	1,087,659.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property			16		
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	2,918,065.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a _____					
b _____					
c _____					
d _____					
e _____					
12 Subtotal. Add columns (b), (d), and (e)		0.		4,015,333.	0.
13 Total. Add line 12, columns (b), (d), and (e)				13 4,015,333.	

(See worksheet in line 13 instructions to verify calculations.)

## **Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes**

[illegible]


<b>Part XVII</b>	<b>Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations</b>
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		Yes	No
<b>1</b>	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		
<b>a</b>	Transfers from the reporting foundation to a noncharitable exempt organization of:		
	(1) Cash	1a(1)	X
	(2) Other assets	1a(2)	X
<b>b</b>	Other transactions.		
	(1) Sales of assets to a noncharitable exempt organization	1b(1)	X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)	X
	(3) Rental of facilities, equipment, or other assets	1b(3)	X
	(4) Reimbursement arrangements	1b(4)	X
	(5) Loans or loan guarantees	1b(5)	X
	(6) Performance of services or membership or fundraising solicitations	1b(6)	X
<b>c</b>	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c	X
<b>d</b>	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received		

[illegible]

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

<b>b</b> If "Yes," complete the following schedule.		
<b>(a)</b> Name of organization	<b>(b)</b> Type of organization	<b>(c)</b> Description of relationship
<b>N/A</b>		

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.					May the IRS discuss this return with the preparer shown below (see instr.)? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	 Signature of officer or trustee		11/5/13 Date	PRESIDENT Title		
Paid Preparer Use Only	Print/Type preparer's name CARLA M. MCCALL, CPA		Preparer's signature CARLA M. MCCALL,	Date 09/13/13	Check <input type="checkbox"/> if self-employed	PTIN P00535908
	Firm's name ▶ ALEXANDER, ARONSON, FINNING & CO., P.C.				Firm's EIN ▶ 04-2571780	
	Firm's address ▶ 21 EAST MAIN STREET WESTBORO, MA 01581				Phone no. 508-366-9100	

**Schedule B**(Form 990, 990-EZ,  
or 990-PF)Department of the Treasury  
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

MERCK FAMILY FUND

22-6063382

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)( ) (enter number) organization☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck 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)

Name of organization <b>MERCK FAMILY FUND</b>	Employer identification number <b>22-6063382</b>
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**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
1	<b>EMILY HALL TREMAINE FOUNDATION</b> <b>171 ORANGE STREET</b> <b>NEW HAVEN, CT 06510</b>	\$ <b>10,000.</b>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution )
2	<b>NAT CHAMBERLIN</b> <b>95 ELIOT STREET, SUITE 2</b> <b>MILTON, MA 02186</b>	\$ <b>10,000.</b>	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II if there is a noncash contribution )
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution )
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution )
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution )
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution )
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution )



Employer identification number

22-6063382

**Part II    Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed

[illegible]

Name of organization <b>MERCK FAMILY FUND</b>	Employer identification number <b>22-6063382</b>
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**Part III** Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once) ▶ \$ \_\_\_\_\_

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

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

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SOURCE	AMOUNT
MONEY MARKET	9,609.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	9,609.

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FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
SECURITIES AND FIXED INCOME OBLIGATIONS	1,087,659.	0.	1,087,659.
TOTAL TO FM 990-PF, PART I, LN 4	1,087,659.	0.	1,087,659.

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FORM 990-PF OTHER INCOME STATEMENT 3

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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
CAPITAL LOSS - K-1	0.	<31,205.>	0.
TOTAL TO FORM 990-PF, PART I, LINE 11	0.	<31,205.>	0.

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FORM 990-PF ACCOUNTING FEES STATEMENT 4

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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING SERVICES	15,200.	0.	0.	15,200.
TO FORM 990-PF, PG 1, LN 16B	15,200.	0.	0.	15,200.

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FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT ADVISORY FEES	106,250.	106,250.	0.	0.
CUSTODY FEES	29,159.	29,159.	0.	0.
INVESTMENT MANAGEMENT FEES	317,672.	488,997.	0.	0.
TO FORM 990-PF, PG 1, LN 16C	453,081.	624,406.	0.	0.

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FORM 990-PF	TAXES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES PAID	36,688.	0.	0.	0.
PAYROLL TAXES	18,085.	1,255.	0.	16,830.
FEDERAL EXCISE AND DEFERRED TAXES	117,826.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 18	172,599.	1,255.	0.	16,830.

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FORM 990-PF	OTHER EXPENSES	STATEMENT	7
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MISCELLANEOUS EXPENSES	12,289.	0.	0.	12,289.
TEMPORARY HELP AND CONSULTANTS	144,726.	0.	0.	144,726.
TELEPHONE EXPENSE	5,600.	0.	0.	5,600.
OFFICE SUPPLIES	4,679.	0.	0.	4,679.
WORKER/PROPERTY/LIABILITY INSURANCE	2,495.	0.	0.	<655.>
TO FORM 990-PF, PG 1, LN 23	169,789.	0.	0.	166,639.

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FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	8
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
GOVERNMENT OBLIGATIONS	X		3,006,705.	3,006,705.
TOTAL U.S. GOVERNMENT OBLIGATIONS			3,006,705.	3,006,705.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			3,006,705.	3,006,705.

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FORM 990-PF	CORPORATE STOCK	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCK	30,404,860.	30,404,860.
TOTAL TO FORM 990-PF, PART II, LINE 10B	30,404,860.	30,404,860.

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FORM 990-PF	CORPORATE BONDS	STATEMENT	10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS	5,504,689.	5,504,689.
TOTAL TO FORM 990-PF, PART II, LINE 10C	5,504,689.	5,504,689.

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FORM 990-PF	OTHER INVESTMENTS	STATEMENT	11
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
LIMITED PARTNERSHIPS	FMV	10,137,547.	10,137,547.
TOTAL TO FORM 990-PF, PART II, LINE 13		10,137,547.	10,137,547.

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FORM 990-PF    DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT    STATEMENT    12

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DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
COMPUTERS AND SOFTWARE	4,469.	4,469.	0.
FURNITURE AND EQUIPMENT	8,833.	6,594.	2,239.
LEASEHOLD IMPROVEMENT	17,138.	14,281.	2,857.
TOTAL TO FM 990-PF, PART II, LN 14	30,440.	25,344.	5,096.

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FORM 990-PF    OTHER ASSETS    STATEMENT    13

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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
INTEREST AND DIVIDENDS RECEIVABLE	179,629.	108,475.	108,475.
PREPAID EXCISE TAXES	18,522.	36,465.	36,465.
PROGRAM RELATED INVESTMENT	40,000.	40,000.	40,000.
TO FORM 990-PF, PART II, LINE 15	238,151.	184,940.	184,940.

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FORM 990-PF    OTHER LIABILITIES    STATEMENT    14

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DESCRIPTION	BOY AMOUNT	EOY AMOUNT
DEFERRED EXCISE TAX	78,399.	125,300.
TOTAL TO FORM 990-PF, PART II, LINE 22	78,399.	125,300.

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FORM 990-PF      PART VIII - LIST OF OFFICERS, DIRECTORS      STATEMENT 15  
TRUSTEES AND FOUNDATION MANAGERS

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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
JENNY RUSSELL 95 ELIOT STREET, SUITE 2 MILTON, MA 02186	EXECUTIVE DIRECTOR 40.00	169,533.	54,424.	0.
NAT CHAMBERLIN 95 ELIOT STREET, SUITE 2 MILTON, MA 02186	PRESIDENT 1.00	0.	0.	0.
HENRY HATCH 95 ELIOT STREET, SUITE 2 MILTON, MA 02186	TRUSTEE 1.00	0.	0.	0.
ELIZABETH MERCK LAKE 95 ELIOT STREET, SUITE 2 MILTON, MA 02186	SECRETARY 1.00	0.	0.	0.
WHITNEY HATCH 95 ELIOT STREET, SUITE 2 MILTON, MA 02186	TRUSTEE 1.00	0.	0.	0.
ELIZA HATCH 95 ELIOT STREET, SUITE 2 MILTON, MA 02186	VICE PRESIDENT 1.00	0.	0.	0.
KATIE CHAMBERLIN 95 ELIOT STREET, SUITE 2 MILTON, MA 02186	TRUSTEE 1.00	0.	0.	0.
WIL MERCK 95 ELIOT STREET, SUITE 2 MILTON, MA 02186	TREASURER 1.00	0.	0.	0.
IAN HATCH 95 ELIOT STREET, SUITE 2 MILTON, MA 02186	TRUSTEE 1.00	0.	0.	0.
ELLIOTT MERCK 95 ELIOT STREET, SUITE 2 MILTON, MA 02186	TRUSTEE 1.00	0.	0.	0.
SERENA WHITRIDGE 95 ELIOT STREET, SUITE 2 MILTON, MA 02186	TRUSTEE 1.00	0.	0.	0.

TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII

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169,533.	54,424.	0.
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FORM 990-PF

SUMMARY OF PROGRAM-RELATED INVESTMENTS

STATEMENT 16

## DESCRIPTION

PROGRAM-RELATED INVESTMENT TO THIRD SECTOR NEW ENGLAND, INC.  
AS FISCAL SPONSORS FOR THE CARROT PROJECT, WHICH IS  
DEDICATED TO CREATING FINANCING SOLUTIONS FOR SMALL AND  
MIDSIZED FARMS, LIMITED-RESOURCE FARMS, AND THOSE USING  
ECOLOGICALLY SOUND PRACTICES.

AMOUNT

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

40,000.



**Form 990 PF – Merck Family Fund, 22-6063382**

**Part XV: Supplementary Information**

**3.a. Grants Paid During the Year**

**1. Added Value**

\$30,000

To support the development of young urban farmers in Red Hook with the goal of creating a more just and sustainable food system for all.

*370 Van Brunt Street  
Brooklyn, NY 11231*

**2. Alliance for Affordable Energy**

\$20,000

To create effective energy efficiency policy in Louisiana's regulatory environment in order to lower energy bills, decrease pollution, build jobs, and prevent costly new plant construction.

*2372 St Claude Ave , #300A  
New Orleans, LA 70117*

**3. American Rivers**

\$25,000

To implement a voluntary watershed services payment system designed to protect and restore specific hardwood forest parcels that provide clean drinking water for greater Atlanta.

*1101 14th Street, NW STE 1400  
Washington, DC 20005*

**4. Appalachian Voices**

\$35,000

To promote energy efficiency on-bill financing programs by Rural Electric Cooperatives in NC, TN and VA.

*171 Grand Boulevard  
Boone, NC 28607*

**5. As You Sow**

\$25,000

To use shareholder advocacy to advocate for producer responsibility for paper and packaging.

*1611 Telegraph Ave Suite 1450  
Oakland, CA 94612*

**6. Associated Grant Makers (AGM)**

\$3,800

Membership Grant

*55 Court Street Suite 520  
Boston, MA 02108*

**7. Blue Ridge Forever**

\$20,000

2nd year of two-year grant to coordinate a network of land trusts focused on land protection in western North Carolina.

*34 Wall Street Suite 512  
Asheville, NC 28801-2710*

**8. Boston Natural Areas Network**

\$30,000

To use 2 urban farms: 1-on the roof of BPHC Roxbury campus, and 2-at DCR's Stony Brook Res., and 36 Boston Youth to grow food year round with an innovative approach using season extenders

*62 Summer Street  
Boston, MA 02110*

**9. Brooklyn Food Coalition**

\$20,000

To support 10 youth to organize a Youth Summit & college fair on farming and food justice as part of the Brooklyn Food Conference 5.12.2012; and to continue year-round organizing of Brooklyn youth farmers.

*33 Flatbush Ave , 5th Floor  
Brooklyn, NY 11217*

**10. Camden City Garden Club, Inc.**

\$35,000

To train and employ 28 youth who will support the expansion of urban farms in Camden from 116 to 126 to provide access to healthy food and increase food security for residents.

*3 Riverside Drive  
Camden, NJ 08103*

**11. Canopy**

\$62,500

To support harnessing the power of the marketplace for forest conservation by transforming the paper purchasing practices of the print and publishing industries.

*1014 Torney Ave  
San Francisco, CA 94129-1755*

**12. Capital District Community Gardens**

\$20,000

To support operations and expansion of The Produce Project, an entrepreneurial jobs training program for disadvantaged youth from Troy High School based on an urban farming business in downtown Troy.

*40 River Street  
Troy, NY 12180*

**13. Center For Environmental Transformation**

\$35,000

To train and employ 19 youth to grow heirloom seedlings and farm three plots of land in the South Waterfront community of Camden.

*1729 Ferry Avenue  
Camden, NJ 08104*

**Form 990 PF – Merck Family Fund, 22-6063382**

**Part XV: Supplementary Information**

**3.a. Grants Paid During the Year**

**14. City Green, Inc.**

\$35,000

To support 24 youth to grow food on one urban farm in Paterson and a new three acre farm in Clifton New Jersey.

*171 Grove Street  
Clifton, NJ 07013*

**15. Clean Air - Cool Planet**

\$80,000

2nd year of two-year grant to help build a region-wide movement of local energy committees and commissions that have the resources and capacity needed to effectively address energy efficiency in their towns.

*100 Market Street Suite 204  
Portsmouth, NH 03801*

**16. Coastal Conservation League**

\$75,000

2nd year of two-year grant to adopt a statewide clean energy standard and energy efficiency financing mechanism, and support the formation of a state green business association capable of effectively advocating for progressive energy policies.

*328 East Bay Street Post Office Box 1765  
Charleston, SC 29402*

**17. Common Ground**

\$40,000

To support 40 youth to grow food on the one acre demonstration farm at Common Ground High School and at a new community farm at the Quinnipiaq housing project.

*385 Springside Avenue  
New Haven, CT 06515*

**18. Confluence Philanthropy**

\$5,000

Membership Grant

*23 Black Brook Rd  
Pound Ridge, NY 10576*

**19. Conservation Law Foundation**

\$50,000

2nd year of two-year grant to reduce greenhouse gas emissions through the implementation and expansion of energy efficiency in New England.

*62 Summer Street  
Boston, MA 02110*

**20. Consultative Group on Biodiversity (CGBD)**

\$4,550

Membership Grant

*Presidio Building 1016, Second Floor P O Box 29361  
San Francisco, CA 94129-0361*

**21. Cultivating Community**

\$16,000

To support 40 youth to grow food on the 1 acre Boyd Community Farm in Portland, as well as to support growing at several school sites in the city.

*52 Mayo Street P O Box 3792  
Portland, ME 0410-3792*

**22. Design Trust for Public Space**

\$25,000

To support Five Borough Farm including a citywide urban agriculture workshop; two videos; a Task Force on urban agriculture; and a pilot data collection project.

*40 Worth Street #603  
New York, NY 10013*

**23. Dogwood Alliance**

\$30,000

To advance forest conservation in the Southeastern U.S. through the development of viable ecosystem markets, beginning with carbon.

*P O Box 7645  
Asheville, NC 28802*

**24. East Park Revitalization Alliance**

\$15,000

To build the capacity of The Philadelphia Community Farming Collaborative to address city-wide urban farming issues.

*1737 N 31st Street  
Philadelphia, PA 19121*

**25. EGA - Annual Retreat**

\$7,500

To support general expenses of the 25th anniversary annual retreat.

*475 Riverside Drive Suite 960  
New York, NY 10115*

**26. Energy Foundation**

\$25,000

To host a national and regional energy efficiency advocates meeting to share best practices, coordinate strategies and identify new advocacy opportunities.

*301 Battery Street  
San Francisco, CA 94111*

**Form 990 PF – Merck Family Fund, 22-6063382**

**Part XV: Supplementary Information**

**3.a. Grants Paid During the Year**

**27. Environment Northeast (ENE)**

\$100,000

To provide analysis and advocacy to sustain and increase investments in energy efficiency, reduce GHGs and improve RGGI by tracking benefits and expanding the program.

*P O Box 583*

*Rockport, ME 04856*

**28. Environmental and Energy Study Institute**

\$25,000

To support on-bill energy efficiency financing programs in the Southeast with federal dollars.

*1112 16th St NW Suite 300*

*Washington, DC 20036*

**29. Environmental Grantmakers Association (EGA)**

\$1,983

Membership Grant

*475 Riverside Drive Suite 960*

*New York, NY 10115*

**30. Environmental Paper Network**

\$35,000

To support collaboration and priority projects that build the capacity of the environmental paper movement, accelerate transformation in the paper industry, and achieve a Common Vision.

*16 Eagle Street Ste 200*

*Asheville, NC 28801*

**31. Federation of Neighborhood Centers**

\$40,000

To support further inroads to reach Philadelphia's hungriest and poorest children and families by continued support and expansion of FNC flagship neighborhood and youth enrichment program, Teens4Good.

*1528 Walnut Street Suite 200*

*Philadelphia, PA 19102*

**32. Forest Guild**

\$40,000

To support the demonstration of the SE Biomass Harvesting Guidelines and to engage industrial consumers to utilize the guidelines in their procurement process.

*P O Box 519*

*Santa Fe, NM 87504*

**33. ForestEthics**

\$40,000

To drive major companies to adopt more environmentally responsible paper practices.

*1329 N State Street Suite 302*

*Bellingham, WA 98225*

**34. FRESH New London**

\$25,000

To support the youth farm project to develop leadership in the community to transform the food system.

*89 South Street*

*Boston, MA 02111*

**35. Funders' Collaborative on Youth Organizing**

\$25,000

To support the Funders' Collaborative on Youth Organizing's 2013 ReGenerations' Leadership Pipeline Initiative through grantee convenings and capacity building assistance.

*20 Jay Street Suite 210B*

*Brooklyn, NY 11201*

**36. Gardening the Community**

\$25,000

To support 24 youth leaders to address Springfield's community food security needs through urban farming and food distribution.

*250 Albany Street*

*Springfield, MA 01105*

**37. Greater Newark Conservancy**

\$30,000

To support the Urban Farming and Food Access Initiative which 45 youth leaders to improve access to healthy, affordable food for Newark, NJ's low-income, inner-city residents.

*32 Prince Street*

*Newark, NJ 07103*

**38. Green America - Better Paper Project**

\$30,000

To support collaboration with the magazine industry to use recycled and FSC certified paper.

*1612 K Street Suite 600*

*Washington, DC 20006*

**39. Green Guerillas**

\$30,000

To support an urban farm, a center for youth empowerment, and a place for Crown Heights/East Flatbush residents to come together and gain access to fresh, healthy food.

*232 E 11th Street*

*New York, NY 10003*

**Form 990 PF – Merck Family Fund, 22-6063382**

**Part XV: Supplementary Information**

**3.a. Grants Paid During the Year**

**40. Green Press Initiative**

\$30,000

To support collaboration with book and newspaper publishers to use environmentally friendly paper practices.

*68 Morningside Drive Suite 1  
Asheville, NC 28806*

**41. Hartford Food System, Inc**

\$20,000

To support summer youth farming and the organizing capacity for Grow Hartford that focuses on dramatically increasing youth participation and leadership in community food systems.

*86 Park Street 2nd Floor  
Hartford, CT 06106*

**42. Just food**

\$500

Spring 2012 Retreat Honorarium

*1155 Avenue of the Americas, 3rd Floor  
New York, NY 10036*

**43. Land Trust Alliance**

\$30,000

2nd year of two-year grant to provide technical assistance, networking and support to land trusts in the S. Appalachians and SC coast.

*1660 L Street NW Ste 1100  
Washington, DC 20036*

**44. Land Trust for Tennessee**

\$35,000

To support expanded and linked protected lands in the South Cumberland region.

*209 10th Avenue South Suite 511  
Nashville, TN 37203*

**45. Lowell Center**

\$14,000

To support a corporate charrette for sustainable cell phone design.

*Lowell Center for Sustainable Production University of  
Massachusetts Lowell  
Lowell, MA 01854*

**46. MA Food Policy**

\$4,200

To teach young people of color about food justice, access and security, provide training and employment opportunities, and expand the capacity of neighborhood urban farms, markets and food pantries.

*95 Eliot Street  
Milton, MA 02186*

**47. MACED**

\$50,000

To support a pilot program that offers energy efficient retrofits to rural residencies in eastern Kentucky.

*433 Chestnut Street  
Berea, KY 40403*

**48. Make the Road New York**

\$25,000

To teach young people of color about food justice, access and security; provide training and employment opportunities; and expand the capacity of neighborhood urban farms, markets and food pantry.

*301 Grove Street  
Brooklyn, NY 11237*

**49. Massachusetts Avenue Project**

\$30,000

To support youth training and community education components of our Growing Green Urban Agriculture Program, located in Buffalo, NY.

*271 Grant Street  
Buffalo, NY 14213*

**50. National Parks Conservation Association**

\$20,000

To support the Southeast Regional Office to finalize a federal petition that will protect Tennessee ridgelines from mountain top removal

*777 6th Street NW Suite 700  
Washington, DC 20001*

**51. Natural Resources Council of Maine**

\$40,000

To increase support for energy efficiency statewide through long-term funding and statewide policy.

*3 Wade Street  
Augusta, ME 04330*

**52. Natural Resources Defense Council (NRDC)**

\$50,000

To advance responsible paper practices in the sports and entertainment industries and protect the Cumberland Plateau region.

*40 W 20th Street  
New York, NY 10011*

**53. Norris Square Neighborhood Project**

**Form 990 PF – Merck Family Fund, 22-6063382**

**Part XV: Supplementary Information**

**3.a. Grants Paid During the Year**

\$20,000

To expand three key areas of the Urban Garden Program by engaging 25 teens educational programming, workforce development and organizational governance.

*2141 N Howard Street  
Philadelphia, PA 19122*

**54. Northeast Energy Efficiency Partnerships (NEEP)**

\$100,000

General support for NEEP's mission to accelerate energy efficiency in homes, buildings and industry in the Northeast and Mid-Atlantic region.

*91 Hartwell Avenue  
Lexington, MA 02421*

**55. Northstar Fund**

\$7,500

To support the Community Food Funders affinity group to build a just and sustainable food system in the Tri-State area of NY, NJ, and CT.

*520 Eighth Ave., Suite 2203  
New York, NY 10018*

**56. Nuestras Raices**

\$30,000

To support the Nuestras Raices beginning farmer and youth organizing programs to train youth in farm entrepreneurship, economics, sustainable agriculture and community organizing to change the local food system.

*329 Main Street  
Holyoke, MA 01040*

**57. Open Space Institute**

\$125,000

2nd year of two-year grant to provide capital grants and loans for the purchase of land and easements, protecting priority wildlife habitat in Alabama, Georgia, and Tennessee.

*1350 Broadway Suite 201  
New York, NY 10018-7799*

**58. Organization for Refugee and Immigrant Success**

\$20,000

To establish a land and market based agricultural internship program for teen-aged youth living in greater Manchester, NH.

*521 Maple Street  
Manchester, NH 03104*

**59. Product Stewardship Institute**

\$25,000

To support PSI to reduce waste and production impacts and increase recycling of unwanted phone books and direct mail through policies, public action, and the collection and dissemination of new data.

*29 Stanhope Street  
Boston, MA 02116*

**60. Public Interest Law Center of Philadelphia**

\$25,000

To support the Garden Justice Legal Organizing Initiative in Philadelphia to preserve urban farms and organize gardeners and urban farmers to advocate for better land use policies and planning.

*1709 Benjamin Franklin Parkway 2nd Floor  
Philadelphia, PA 19103*

**61. Regional Environmental Council, Inc.**

\$35,000

To support YouthGROW a youth leadership development and employment program for 25 at-risk teens to plant, tend and harvest organic produce on 2 urban farms in Worcester.

*P O Box 255 9 Castle Street  
Worcester, MA 01613*

**62. Resources for the Future**

\$10,000

To create a report that outlines steps for RGGI and the California carbon program to potentially link.

*1616 P Street NW  
Washington, DC 20036*

**63. Southern Alliance for Clean Energy**

\$150,000

To support the advocacy of energy efficiency as a priority energy resource in the Southeast.

*P O Box 1842  
Knoxville, TN 37901*

**64. Southern Environmental Law Center**

\$150,000

2nd year of two-year grant to help the Southeast adopt energy efficiency policies and practices.

*201 West Main Street Suite 14  
Charlottesville, VA 22902*

**65. SouthWings**

\$25,000

**Form 990 PF – Merck Family Fund, 22-6063382**

**Part XV: Supplementary Information**

**3.a. Grants Paid During the Year**

To support SouthWings' role in providing aerial tours of the S. Appalachians to conservation groups, media outlets, elected officials and other stakeholders.

*35 Haywood Street Suite 201  
Asheville, NC 28801*

**66. St. Mary's Nutrition Center**

\$30,000

To train and employ 35 low-income teenagers to grow food in Lewiston's network of community gardens and create improved access to fresh local foods in the state's poorest census tracts.

*P O Box 7291  
Lewiston, ME 04097*

**67. Sustainability Funders Workgroup**

\$20,000

To organize and educate the funding community about sustainable production and consumption practices.

*P O Box 29907  
San Francisco, CA 94129*

**68. Sustainable Agriculture and Food System Funders**

\$5,000

Membership Grant

*16 W Mission St Suite M  
Santa Barbara, CA 93101*

**69. Sustainable Endowments Institute**

\$30,000

To support SEI's Billion Dollar Green Challenge which encourages colleges to cumulatively invest \$1 billion in energy efficiency upgrades through internal green revolving funds.

*45 Mt Auburn Street  
Cambridge, MA 02138*

**70. The Enterprise Center Community Development Corporation**

\$30,000

To support Neighborhood Foods, a holistic community food production and distribution system, that trains 15 disadvantaged youth in farming and leadership development.

*4548 Market Street  
Philadelphia, PA 19139*

**71. The Food Project**

\$30,000

To support The Food Project's integrated sustainable agriculture, youth development, and

community food programs in low-income neighborhoods of Boston and the North Shore.

*10 Lewis Street  
Lincoln, MA 01773*

**72. The Village of Arts and Humanities**

\$30,000

To convert a 15 parcel vacant lot to an urban farm and to support 12 youth in year-round farming and entrepreneurship activities, including launching a catering business that provides nutritional snacks to after-school programs.

*2544 Germantown Ave  
Philadelphia, PA 19133*

**73. The Wilderness Society/LTLT**

\$60,000

To support the prioritization, protection and management for resiliency key portions of the western North Carolina landscape for climate adaptation and connectivity roles.

*1615 M Street NW  
Washington, DC 20036*

**74. United Community Centers**

\$30,000

To support youth and adults to work collaboratively to meet their own food needs and increase access to fresh healthy food for their neighbors while building a stronger community.

*613 New Lots Avenue  
Brooklyn, NY 11207*

**75. US Climate Action Network**

\$50,000

To expand, manage and diversify the Southeastern network of organizations engaged in federal, state and local climate and energy policies.

*1810 16th Street  
Washington, DC 20009*

**76. Visions**

\$1,000

To support program staff from the Organization of Refugee and Immigrant Success to attend the Institute and receive follow-up consulting.

*48 Juniper Street  
Roxbury, MA 02119*

**TOTAL 2012 GRANTS**

\$2,603,533

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **X**

**Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

**Part II Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

Enter filer's identifying number, see instructions

Type or print  File by the due date for filing your return. See instructions	Name of exempt organization or other filer, see instructions		Employer identification number (EIN) or
	MERCK FAMILY FUND		22-6063382
	Number, street, and room or suite no. If a P.O. box, see instructions.		Social security number (SSN)
	95 ELIOT STREET, SUITE 2		
	City, town or post office, state, and ZIP code. For a foreign address, see instructions		
	MILTON, MA 02186		

Enter the Return code for the return that this application is for (file a separate application for each return)

0 4

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01		
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720	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 an automatic 3-month extension on a previously filed Form 8868.**

**THE MERCK FAMILY FUND**

- The books are in the care of **95 ELIOT STREET, SUITE 2 - MILTON, MA 02186**

Telephone No **617-696-3580**

FAX No **617-696-7262**

- If the organization does not have an office or place of business in the United States, check this box ☐

- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_ If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

4 I request an additional 3-month extension of time until **NOVEMBER 15, 2013**

5 For calendar year **2012**, or other tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

6 If the tax year entered in line 5 is for less than 12 months, check reason: ☐ Initial return ☐ Final return

☐ Change in accounting period

7 State in detail why you need the extension

**INFORMATION NEEDED TO FILE A RETURN IS NOT YET AVAILABLE**

8a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	\$	67,441.
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	\$	107,000.
c	<b>Balance due.</b> Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	\$	0.

**Signature and Verification must be completed for Part II only.**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature  Title **PRESIDENT**

Date **11/5/13**

Form 8868 (Rev. 1-2013)