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

2012

For calendar year 2012 or tax year beginning

JUL 1, 2012

, and ending

JUN 30, 2013

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

Name of foundation

THE JULIA & SEYMOUR GROSS  
FOUNDATION, INC.

Number and street (or P O box number if mail is not delivered to street address)

P.O. BOX 506

A Employer identification number

13-6122092

City or town, state, and ZIP code

WESTON, MA 02493-0003

G Check all that apply

Initial return    Initial return of a former public charity  
 Final return    Amended return  
 Address change    Name change

H Check type of organization

Section 501(c)(3) exempt private foundation  
 Section 4947(a)(1) nonexempt charitable trust    Other taxable private foundation

I Fair market value of all assets at end of year  
(from Part II, col (c), line 16)

► \$ 5,830,245. (Part I, column (d) must be on cash basis.)

J Accounting method  
 Cash    Accrual  
 Other (specify) \_\_\_\_\_B Telephone number  
781-237-2544C If exemption application is pending, check here ► D 1. Foreign organizations, check here ► 2. Foreign organizations meeting the 85% test,  
check here and attach computation ► E If private foundation status was terminated  
under section 507(b)(1)(A), check here ► F If the foundation is in a 60-month termination  
under section 507(b)(1)(B), check here ► 

## Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not  
necessarily equal the amounts in column (a))

Revenue		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received			N/A	
2	Check ► <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments	181.	181.		STATEMENT 1
4	Dividends and interest from securities	126,148.	126,148.		STATEMENT 2
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	288,859.			
b	Gross sales price for all assets on line 6a	1,447,207.			
7	Capital gain net income (from Part IV, line 2)		288,859.		RECEIVED
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less Cost of goods sold				
c	Gross profit or (loss)				
11	Other income				
12	Total. Add lines 1 through 11	415,188.	415,188.		
13	Compensation of officers, directors, trustees, etc	39,830.	11,949.		27,881.
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees				
b	Accounting fees	STMT 3	14,444.	0.	14,444.
c	Other professional fees	STMT 4	28,829.	27,662.	1,167.
17	Interest				
18	Taxes	STMT 5	1,400.	1,400.	0.
19	Depreciation and depletion				
20	Occupancy				
21	Travel, conferences, and meetings		42.	0.	42.
22	Printing and publications				
23	Other expenses	STMT 6	4,194.	0.	4,194.
24	Total operating and administrative expenses. Add lines 13 through 23		88,739.	41,011.	47,728.
25	Contributions, gifts, grants paid		255,586.		255,586.
26	Total expenses and disbursements Add lines 24 and 25		344,325.	41,011.	303,314.
27	Subtract line 26 from line 12		70,863.		
a	Excess of revenue over expenses and disbursements				
b	Net investment income (if negative, enter -0-)		374,177.		
c	Adjusted net income (if negative, enter -0-)			N/A	

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
1	Cash - non-interest-bearing				
2	Savings and temporary cash investments		1,074,279.	1,543,323.	1,543,323.
3	Accounts receivable ►				
	Less allowance for doubtful accounts ►				
4	Pledges receivable ►				
	Less allowance for doubtful accounts ►				
5	Grants receivable				
6	Receivables due from officers, directors, trustees, and other disqualified persons				
7	Other notes and loans receivable ►				
	Less allowance for doubtful accounts ►				
8	Inventories for sale or use				
9	Prepaid expenses and deferred charges				
10a	Investments - U S and state government obligations	STMT 7	58,186.	39,545.	43,087.
b	Investments - corporate stock	STMT 8	3,646,817.	3,267,277.	4,243,835.
c	Investments - corporate bonds				
11	Investments - land, buildings, and equipment basis ►				
	Less accumulated depreciation ►				
12	Investments - mortgage loans				
13	Investments - other				
14	Land, buildings, and equipment basis ►				
	Less accumulated depreciation ►				
15	Other assets (describe ►)				
16	Total assets (to be completed by all filers)		4,779,282.	4,850,145.	5,830,245.
17	Accounts payable and accrued expenses				
18	Grants payable				
19	Deferred revenue				
20	Loans from officers, directors, trustees, and other disqualified persons				
21	Mortgages and other notes payable				
22	Other liabilities (describe ►)				
23	Total liabilities (add lines 17 through 22)		0.	0.	
	Foundations that follow SFAS 117, check here ► <input checked="" type="checkbox"/>				
	and complete lines 24 through 26 and lines 30 and 31.				
24	Unrestricted		4,779,282.	4,850,145.	
25	Temporarily restricted				
26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ► <input type="checkbox"/>				
	and complete lines 27 through 31.				
27	Capital stock, trust principal, or current funds				
28	Paid-in or capital surplus, or land, bldg, and equipment fund				
29	Retained earnings, accumulated income, endowment, or other funds				
30	Total net assets or fund balances		4,779,282.	4,850,145.	
31	Total liabilities and net assets/fund balances		4,779,282.	4,850,145.	

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	4,779,282.
2	Enter amount from Part I, line 27a	2	70,863.
3	Other increases not included in line 2 (itemize) ►	3	0.
4	Add lines 1, 2, and 3	4	4,850,145.
5	Decreases not included in line 2 (itemize) ►	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	4,850,145.

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

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)			(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a SEE ATTACHMENT A			P	VARIOUS	VARIOUS
b					
c					
d					
e					
(e) Gross sales price		(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a	1,447,207.		1,158,348.	288,859.	
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (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. (j), if any		
a				288,859.	
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	288,859.	
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	408,953.	5,350,827.	.076428
2010	227,552.	5,249,652.	.043346
2009	207,639.	4,862,913.	.042698
2008	386,698.	5,894,382.	.065605
2007	344,452.	5,729,532.	.060119
2 Total of line 1, column (d)		2	.288196
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	.057639
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5		4	5,610,606.
5 Multiply line 4 by line 3		5	323,390.
6 Enter 1% of net investment income (1% of Part I, line 27b)		6	3,742.
7 Add lines 5 and 6		7	327,132.
8 Enter qualifying distributions from Part XII, line 4		8	303,314.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here ► <input type="checkbox"/> and enter "N/A" on line 1	1	7,484.
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	2	0.
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)	3	7,484.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	0.
3 Add lines 1 and 2	5	7,484.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		
5 Tax based on Investment Income. Subtract line 4 from line 3 If zero or less, enter -0-		
6 Credits/Payments		
a 2012 estimated tax payments and 2011 overpayment credited to 2012	6a	5,286.
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	5,286.
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	2,198.
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11 Enter the amount of line 10 to be Credited to 2013 estimated tax ►	Refunded	11

**Part VII-A Statements Regarding Activities**

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?	Yes	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? <i>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.</i>	1a	X
c Did the foundation file Form 1120-POL for this year?	1b	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.	1c	X
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? <i>If "Yes," attach a detailed description of the activities</i>	2	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? <i>If "Yes," attach a conformed copy of the changes</i>	3	X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5	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?	6	X
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	X
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ► NY		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i>	8b	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)? <i>If "Yes," complete Part XIV</i>	9	X
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	X

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

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions) 11   X

12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions) 12   X

13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 13   X

Website address ► N/A

14 The books are in care of ► JANE ROGERS CLARK, MD Telephone no ► 781-237-2544  
Located at ► P.O. BOX 506, WESTON, MA ZIP+4 ► 02493-0003

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

16 At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes," enter the name of the foreign country ► 16   Yes   No X

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

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

1a During the year did the foundation (either directly or indirectly)  
 (1) Engage in the sale or exchange, or leasing of property with a disqualified person?  Yes  X No  
 (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  Yes  X No  
 (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  Yes  No  
 (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  Yes  No  
 (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?  Yes  X No  
 (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)  Yes  X No

b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?  
 Organizations relying on a current notice regarding disaster assistance check here ► 1b   X

c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 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?  Yes  X No  
 If "Yes," list the years ► 2a   N/A

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) 2b   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.  
 ► 2c   N/A

3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?  Yes  X 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.) 3b   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

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**Part VII-B | Statements Regarding Activities for Which Form 4720 May Be Required (continued)**

5a During the year did the foundation pay or incur any amount to

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?  Yes  No
- (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?  Yes  No
- (3) Provide a grant to an individual for travel, study, or other similar purposes?  Yes  No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?  Yes  No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?  Yes  No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

Organizations relying on a current notice regarding disaster assistance check here ►

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?

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?

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?

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

Yes  No  
 Yes  No  
 Yes  No  
 Yes  No  
 Yes  No

5b  X

Yes  No  
 Yes  No  
 Yes  No  
 Yes  No

6b  X

7b  N/A

**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 9		39,830.	0.	0.

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

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

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

►  0

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services ►

0

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

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

Expenses

1	N/A	
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	N/A	
2		
3	All other program-related investments. See instructions	

Total. Add lines 1 through 3 ►

0.

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a Average monthly fair market value of securities	1a	4,172,266.
b Average of monthly cash balances	1b	1,523,781.
c Fair market value of all other assets	1c	
d Total (add lines 1a, b, and c)	1d	5,696,047.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3	5,696,047.
4 Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	85,441.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	5,610,606.
6 Minimum investment return Enter 5% of line 5	6	280,530.

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

1 Minimum investment return from Part X, line 6		1	280,530.
2a Tax on investment income for 2012 from Part VI, line 5	2a	7,484.	
b Income tax for 2012 (This does not include the tax from Part VI)	2b		
c Add lines 2a and 2b	2c	7,484.	
3 Distributable amount before adjustments Subtract line 2c from line 1	3	273,046.	
4 Recoveries of amounts treated as qualifying distributions	4	0.	
5 Add lines 3 and 4	5	273,046.	
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	273,046.	

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

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		1a	303,314.
a Expenses, contributions, gifts, etc - total from Part I, column (d), line 26	1b		0.
b Program-related investments - total from Part IX-B	2		
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes		3a	
3 Amounts set aside for specific charitable projects that satisfy the	3b		
a Suitability test (prior IRS approval required)	4	303,314.	
b Cash distribution test (attach the required schedule)	5	0.	
4 Qualifying distributions Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	6	303,314.	
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			
6 Adjusted qualifying distributions. Subtract line 5 from line 4			

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

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

	(a) Corpus	(b) Years prior to 2011	(c) 2011	(d) 2012
1 Distributable amount for 2012 from Part XI, line 7				273,046.
2 Undistributed income, if any, as of the end of 2012			0.	
a Enter amount for 2011 only				
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2012				
a From 2007	68,075.			
b From 2008	82,696.			
c From 2009				
d From 2010				
e From 2011	144,832.			
f Total of lines 3a through e	295,603.			
4 Qualifying distributions for 2012 from Part XII, line 4 ► \$ 303,314.			0.	
a Applied to 2011, but not more than line 2a				
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				273,046.
e Remaining amount distributed out of corpus				0.
5 Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a) )		0.		
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	325,871.			
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		68,075.		
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a		257,796.		
10 Analysis of line 9				
a Excess from 2008	82,696.			
b Excess from 2009				
c Excess from 2010				
d Excess from 2011	144,832.			
e Excess from 2012	30,268.			

Form 990-PF (2012)

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12-05-12



THE JULIA & SEYMOUR GROSS  
FOUNDATION, INC.

Form 990-PF (2012)

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**Part XV Supplementary Information (continued)**

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a Paid during the year</b>				
ATTACHMENT C				255,586.
<b>Total</b>				► 3a 255,586.
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>				► 3b 0.

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Form 990-PF (2012)

THE JULIA & SEYMOUR GROSS  
FOUNDATION, INC.

**Form 990-PF (2012)**

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## 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				14 181.	
4 Dividends and interest from securities				14 126,148.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory				18 288,859.	
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.		415,188.	0.
13 Total Add line 12, columns (b), (d), and (e)				13	415,188.
(See worksheet in line 13 instructions to verify calculations.)					

## **Relationship of Activities to the Accomplishment of Exempt Purposes**



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

SOURCE	AMOUNT
INTEREST INCOME - CHECKING	37.
INTEREST INCOME - MONEY MARKET FUND	144.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	181.

## FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DIVIDENDS AND INTEREST FROM SECURITIES	126,148.	0.	126,148.
TOTAL TO FM 990-PF, PART I, LN 4	126,148.	0.	126,148.

## FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BOOKKEEPING & TAX PREPARATION	14,444.	0.		14,444.
TO FORM 990-PF, PG 1, LN 16B	14,444.	0.		14,444.

## FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT ADVISORY FEES	27,662.	27,662.		0.
INFORMATION TECHNOLOGY SERVICES	1,167.	0.		1,167.
TO FORM 990-PF, PG 1, LN 16C	28,829.	27,662.		1,167.

FORM 990-PF

TAXES

STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	1,400.	1,400.		0.
TO FORM 990-PF, PG 1, LN 18	1,400.	1,400.		0.

FORM 990-PF

OTHER EXPENSES

STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DUES AND SUBSCRIPTIONS	1,475.	0.		1,475.
INSURANCE	2,200.	0.		2,200.
OFFICE EXPENSES	269.	0.		269.
FILING FEES	250.	0.		250.
TO FORM 990-PF, PG 1, LN 23	4,194.	0.		4,194.

FORM 990-PF

U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS

STATEMENT 7

DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
ATTACHMENT B		X	39,545.	43,087.
TOTAL U.S. GOVERNMENT OBLIGATIONS				
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			39,545.	43,087.
TOTAL TO FORM 990-PF, PART II, LINE 10A			39,545.	43,087.

FORM 990-PF

CORPORATE STOCK

STATEMENT 8

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
ATTACHMENT B	3,267,277.	4,243,835.
TOTAL TO FORM 990-PF, PART II, LINE 10B	3,267,277.	4,243,835.

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS  
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 9

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
JONATHAN P. GERTLER, MD P.O. BOX 506 WESTON, MA 02493-0003	SECRETARY 5.00	0.	0.	0.
JANE R. CLARK, MD P.O. BOX 506 WESTON, MA 02493-0003	PRESIDENT/EXECUTIVE DIRECT 21.00	39,830.	0.	0.
CLARK CHESSIN GERTLER P.O. BOX 506 WESTON, MA 02493-0003	VICE PRESIDENT 1.00	0.	0.	0.
CHARLES GARRISON GERTLER P.O. BOX 506 WESTON, MA 02493-0003	TREASURER 1.00	0.	0.	0.
ROGER D. KAMM, PHD P.O. BOX 506 WESTON, MA 02493-0003	BOARD MEMBER 0.50	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		39,830.	0.	0.

**The Julia & Seymour Gross Foundation, Inc.**  
**Realized Gain/Loss Schedule**  
**July 1, 2012 through June 30, 2013**

Security	Shares	Gross Proceeds	Cost Basis	Realized Gain/Loss
Apple, Inc.	500	\$ 254,279.04	\$ 100,413.80	\$ 153,865.24
Devon Energy Corp	500	26,449.40	32,491.35	(6,041.95)
Google, Inc. Class A	65	44,555.19	36,780.27	7,774.92
Intel Corp.	1,000	26,234.41	20,109.80	6,124.61
International Paper Co	1,500	62,513.04	47,200.20	15,312.84
National Grid PLC	500	27,364.38	19,177.00	8,187.38
Procter & Gamble Co.	1,000	77,739.65	52,340.00	25,399.65
Southern Co.	500	23,324.47	17,459.50	5,864.97
Staples, Inc	5,000	56,315.73	79,608.50	(23,292.77)
State Street Corp	2,000	112,045.69	91,405.00	20,640.69
Target Corporation	2,000	138,773.38	121,095.00	17,678.38
Travelers Companies Inc	1,000	84,121.21	53,979.00	30,142.21
Travelers Companies, Inc.	500	34,204.23	25,488.00	8,716.23
United Parcel Services Class B	500	35,831.19	37,287.65	(1,456.46)
Wal-Mart Stores, Inc.	445	32,862.96	21,337.75	11,525.21
Waste Mgmt, Inc. Del	5,000	175,084.57	161,183.40	13,901.17
Windstream Corp.	6,000	55,918.74	88,907.20	(32,988.46)
Wisconsin Energy Corp. Hldg. Co.	4,000	158,109.64	120,000.00	38,109.64
Xerox	3,000	21,480.41	32,084.70	(10,604.29)
<b>Total</b>		<b>\$1,447,207.33</b>	<b>\$ 1,158,348.12</b>	<b>\$ 288,859.21</b>

**The Julia & Seymour Gross Foundation, Inc.**  
**Portfolio Value**  
**As of June 30, 2013**

Security	Shares	Cost Basis	Market Value
<b>Stock</b>			
3M Company	2,500.00	195,260.22	273,375.00
Apple Inc	300.00	74,960.75	118,959.00
Berkshire Hathaway Inc Cl. B	2,500.00	121,195.50	279,800.00
Chevron Corp	2,000.00	169,463.00	236,680.00
Cisco Systems Inc	3,000.00	59,525.00	73,005.00
Clearbridge Energy MLP FD Inc	5,000.00	119,539.00	140,750.00
Conocophillips	1,500.00	86,481.57	90,750.00
Devon Energy Corp	1,000.00	64,982.70	51,880.00
E I Du Pont De Nemours & Co	3,000.00	132,091.10	157,500.00
Exxon Mobil Corp	3,500.00	244,709.75	316,225.00
General Electric Co	7,000.00	175,142.16	162,330.00
Google Inc Class A, CGMI and/or its Affiliates	75.00	42,438.78	66,027.75
Intel Corp CGMI and/or its affiliates	3,000.00	69,107.80	72,690.00
International Paper Co	2,000.00	62,933.60	88,620.00
Lockheed Martin Corp	1,000.00	93,347.90	108,460.00
Merck & Co Inc New Com	1,500.00	67,834.05	69,675.00
MetLife Incorporated	1,764.00	69,221.27	80,720.64
Metlife Inc Common Equity UTS SNY 5%	2,500.00	138,424.00	136,975.00
Microsoft Corp CGMI and/or its affiliates	10,000.00	272,386.30	345,450.00
National Grid PLC	1,000.00	43,209.00	56,670.00
Nestle S A Sponsored ADR	1,500.00	71,560.00	98,670.00
Nextera Energy Inc	1,500.00	84,878.40	122,220.00
Peoples United Fincl Inc	6,000.00	85,037.70	89,400.00
Phillips 66	750.00	25,701.03	44,182.50
PPG Industries Inc	1,000.00	63,469.00	146,410.00
Procter & Gamble Co	1,000.00	52,906.67	76,990.00
Qualcomm Inc	1,000.00	64,703.00	61,090.00
Royal Dutch Shell PLC	1,000.00	68,642.00	63,800.00
Southern Co	1,000.00	35,452.90	44,130.00
Texas Instruments	1,500.00	46,258.05	52,275.00
Travelers Companies Inc	1,000.00	49,249.62	79,920.00
United Parcel Service CL B	2,000.00	146,284.00	172,960.00
Wal-Mart Stores Inc	1,500.00	74,975.00	111,735.00
Walt Disney Co	2,000.00	66,078.00	126,300.00
Xerox	3,000.00	29,828.20	27,210.00
	<b>3,267,277.02</b>	<b>4,243,834.89</b>	
<b>BONDS</b>			
GNMA PL#003345M 5.0% Due 2/20/33		12,287.68	12,600.87
GNMA PL#003247M 5.0% Due 6/20/32		6,236.53	8,964.42
GNMA PL#003233M 5.5% Due 5/20/17		3,362.01	2,651.71
GNMA PL# 003259M 5.5% Due 7/20/32		6,542.68	7,587.30
GNMA PL#590122X 6% Due 5/15/32		2,617.28	4,923.08
GNMA PL#003249M 6% Due 6/20/32		5,410.25	4,659.16
GNMA PL#586596X 6.5% Due 6/15/32		3,088.37	1,700.62
	<b>39,544.80</b>	<b>43,087.16</b>	
<b>TOTAL INVESTMENTS</b>		<b>\$ 3,306,821.82</b>	<b>\$ 4,286,922.05</b>

**The Julia & Seymour Gross Foundation, Inc.**  
**Grants Paid**  
**As of June 30, 2013**

Grantee	Foundation Status	Purpose of Grant	Amount
<b>Belmont Hill School</b> 350 Prospect Street, Belmont, MA 02478	Public Charity	General	1,000 00
<b>Boston Medical Center</b> Office of Development, 1 Medical Center Place, Suite 1 Boston, MA 02118	Public Charity	General	13,000 00
<b>Boston University School of Medicine</b> Development Office, 72 East Concord Street, L-219 Boston, MA 02118	Public Charity	General	15,000 00
<b>Boston Youth Symphony Orchestra</b> 855 Commonwealth Avenue Boston, MA 02215	Public Charity	General	10,000 00
<b>Buzzards Bay Coalition, Inc.</b> 114 Front Street New Bedford, MA 02740	Public Charity	General	1,000 00
<b>Children of Peace International</b> 773 Johnson Ave Loveland, CO 80537	Public Charity	General	4,800.00
<b>Columbia P&amp;S Gift Systems</b> 475 Riverside Drive, New York, NY 10115	Public Charity	General	1,000 00
<b>Community Foundation of Southeastern Massachusetts, Inc.</b> 63 Union Street New Bedford, MA 02740	Public Charity	General	500 00

**The Julia & Seymour Gross Foundation, Inc.**  
**Grants Paid**  
**As of June 30, 2013**

<u>Grantee</u>	<u>Foundation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
<b>Community Legal Services &amp; Counseling Center</b> 1 West Street, Cambridge, MA 02139	Public Charity	General	4,800.00
<b>Dana-Farber Cancer Institute, Inc.</b> 450 Brookline Avenue Boston, MA 02115	Public Charity	General	500.00
<b>Free the Slaves</b> 1320 19th Street NW, Suite 600 Washington, DC 20039	Public Charity	General	4,800.00
<b>Friends of Resiliency for Life, Inc.</b> 115 A Street, Framingham, MA 01701	Public Charity	General	1,000.00
<b>Friends of St. Martin De Porres School</b> c/o Bob Morrison, Director of Development 2300 West LeHigh Avenue Philadelphia, PA 19132	Public Charity	General	1,000.00
<b>Georgia Tech Foundation</b> 3115 Ferst Drive NW, Atlanta, Georgia 30332	Project ENGAGE-IBB		10,000.00
<b>Harvard College</b> 124 Mount Auburn Street, Cambridge, MA 02138	Public Charity	General	2,000.00

**The Julia & Seymour Gross Foundation, Inc.**  
**Grants Paid**  
**As of June 30, 2013**

<u>Grantee</u>	<u>Foundation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
<b>Harvard College - Freshman Arts Program</b> 124 Mount Auburn Street, Cambridge, MA 02138	Public Charity	General	2,000.00
<b>Harvard College - Parents Fund</b> 124 Mount Auburn Street, Cambridge, MA 02138	Public Charity	General	5,000.00
<b>Home for Little Wanderers-Waltham House</b> 271 Huntington Ave Boston, MA 02115	Public Charity	General	4,800.00
<b>Joslin Diabetes Center</b> 1 Joslin Place, Boston, MA 02215	Public Charity	General	10,000.00
<b>Klezmer Conservatory Foundation, Inc</b> 7 Sidney Street, Watertown, MA 02472	Public Charity	General	1,000.00
<b>Land's Sake, Inc.</b> 27 Crescent Street, Weston, MA 02493	Public Charity	General	1,000.00
<b>Mass Audubon Society</b> 208 South Great Road, Lincoln, MA 01773	Public Charity	General	1,000.00

**The Julia & Seymour Gross Foundation, Inc.**  
**Grants Paid**  
**As of June 30, 2013**

<u>Grantee</u>	<u>Foundation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
<b>Massachusetts Institute of Tech - Meredith Kamm Fund</b> 600 Memorial Drive W98-200, Cambridge MA 02139	Public Charity	General	4,800 00
<b>Max Warburg Courage Curriculum, Inc</b> 360 Huntington Avenue, PO Box 52 Boston, MA 02115	Public Charity	General	4,800 00
<b>McGill University</b> 845 Sherbrooke Street West, Montreal, QC H3a2T5, Canada	Foreign Charity. Equivalent to US Public Charity	School of Music	21,286 00
<b>National Rowing Foundation, Inc.</b> 67 Mystic Road North Stonington, CT 06359	Public Charity	World University Games	500.00
<b>One Fund Boston, Inc.</b> 800 Boylston Street, Unit 990009 Boston, MA 02199	Public Charity	General	4,000.00
<b>Performance Zone, Inc. (dba "The Field")</b> 161 Sixth Avenue, 14th Floor New York, NY 10013	Public Charity	Amios Production	1,000.00
<b>Radcliffe Institute for Advanced Study</b> 10 Garden Street, Cambridge, MA 02138	Public Charity	General	25,000 00

**The Julia & Seymour Gross Foundation, Inc.**  
**Grants Paid**  
**As of June 30, 2013**

<u>Grantee</u>	<u>Foundation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
<b>SquashBusters, Inc.</b> 795 Columbus Avenue, Roxbury Crossing, MA 02120	Public Charity	General	15,000.00
<b>St Paul's School Advanced Studies Program</b> 325 Pleasant Street, Concord, NH 03301	Public Charity	General	1,000.00
<b>The African Leadership Bridge</b> c/o Charles R Reeder, Jr 7713 Yaupon Drive Austin, TX 78759	Public Charity	General	2,000.00
<b>The Fund for Dartmouth Medical School</b> DMS Office of Development, One Medical Center, Drive Lebanon, NH 03756	Public Charity	General	1,000.00
<b>Town of Weston - WEEFC</b> 89 Wellesley Street, Weston, MA 02493	Public Charity	General	3,000.00
<b>Weill Medical College of Cornell University</b> 1300 York Avenue, New York, NY 10021	Public Charity	Hajjar Harvard Fellowship	20,000.00
<b>Wesleyan University</b> 318 High Street, Middletown, CT 06459	Public Charity	Petricelli Center Endowment	25,000.00

**The Julia & Seymour Gross Foundation, Inc.**  
**Grants Paid**  
**As of June 30, 2013**

Grantee	Foundation Status	Purpose of Grant	Amount
<b>Weston Affordable Housing Foundation, Inc</b> PO Box 171 Weston, MA 02493	Public Charity	General	1,000 00
<b>Weston Public Schools - "Weston Melco Gift Fund"</b> 444 Wellesley Street Weston, MA 02493	Public Charity	General	2,500 00
<b>Westport River Watershed Alliance</b> 1151 Main Road, PO Box 3427, Westport, MA 02790	Public Charity	General	10,000 00
<b>Yale University - School of Medicine</b> PO Box 7611, New Haven, CT 06519	Public Charity	Portrait Project	18,000 00
<b>Yale University - School of Medicine</b> PO Box 7611, New Haven, CT 06519	Public Charity	Yanagisawa Fund	500 00
	Total Grants.		<u><u>255,586 00</u></u>