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

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

2012

Open to public inspection

For calendar year 2012 or tax year beginning OCT 1, 2012, and ending SEP 30, 2013

Name of foundation THE LALOR FOUNDATION, INC.		A Employer identification number 51-6000153
Number and street (or P.O. box number if mail is not delivered to street address) 77 SUMMER STREET, 8TH FLOOR		B Telephone number 617-426-7080
City or town, state, and ZIP code BOSTON, MA 02110		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 14,285,790.	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)
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					
4 Dividends and interest from securities		291,256.	291,256.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		275,871.			
b Gross sales price for all assets on line 6a 2,550,123.					
7 Capital gain net income (from Part IV, line 2)			275,871.		
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		567,127.	567,127.		
13 Compensation of officers, directors, trustees, etc		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 2		4,931.	0.		4,931.
c Other professional fees STMT 3		92,270.	50,143.		52,287.
17 Interest					
18 Taxes STMT 4		41,873.	2,112.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings		258.	0.		258.
22 Printing and publications					
23 Other expenses STMT 5		4,943.	0.		4,943.
24 Total operating and administrative expenses. Add lines 13 through 23		144,275.	52,255.		62,419.
25 Contributions, gifts, grants paid		437,000.			416,500.
26 Total expenses and disbursements. Add lines 24 and 25		581,275.	52,255.		478,919.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<14,148.>			
b Net investment income (if negative, enter -0-)			514,872.		
c Adjusted net income (if negative, enter -0-)				N/A	

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	
Assets	1 Cash - non-interest-bearing	25,348.	153,594.	153,594.	
	2 Savings and temporary cash investments	392,417.	583,573.	583,573.	
	3 Accounts receivable ▶				
	Less: allowance for doubtful accounts ▶	2,398.			
	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 6	251,137.	0.	0.	
	b Investments - corporate stock STMT 7	8,464,716.	9,781,245.	9,781,245.	
	c Investments - corporate bonds STMT 8	2,186,079.	1,380,211.	1,380,211.	
Liabilities	11 Investments - land, buildings, and equipment: basis ▶				
	Less accumulated depreciation ▶				
	12 Investments - mortgage loans				
	13 Investments - other STMT 9	1,464,347.	2,387,167.	2,387,167.	
	14 Land, buildings, and equipment: basis ▶				
	Less accumulated depreciation ▶				
	15 Other assets (describe ▶)				
	16 Total assets (to be completed by all filers)	12,786,442.	14,285,790.	14,285,790.	
	17 Accounts payable and accrued expenses	10,160.	4,177.		
	18 Grants payable	105,500.	126,000.		
Net Assets or Fund Balances	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable				
	22 Other liabilities (describe ▶ DEFERRED EXCISE TAX)	68,200.	97,550.		
	23 Total liabilities (add lines 17 through 22)	183,860.	227,727.		
Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>	24 Unrestricted				
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>	27 Capital stock, trust principal, or current funds	12,602,582.	14,058,063.	
		28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
		29 Retained earnings, accumulated income, endowment, or other funds	0.	0.	
		30 Total net assets or fund balances	12,602,582.	14,058,063.	
	31 Total liabilities and net assets/fund balances	12,786,442.	14,285,790.		

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	12,602,582.
2 Enter amount from Part I, line 27a	2	<14,148.>
3 Other increases not included in line 2 (itemize) ▶ UNREALIZED GAIN ON INVESTMENTS	3	1,469,629.
4 Add lines 1, 2, and 3	4	14,058,063.
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	14,058,063.

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 PUBLICLY TRADED SECURITIES					
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 2,550,123.		2,274,252.	275,871.		
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			275,871.		
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	275,871.	
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	545,087.	12,161,773.	.044820
2010	427,583.	11,978,473.	.035696
2009	604,096.	10,949,276.	.055172
2008	391,714.	9,438,749.	.041501
2007	279,878.	12,785,376.	.021890
2 Total of line 1, column (d)			2 .199079
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 .039816
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5			4 13,356,830.
5 Multiply line 4 by line 3			5 531,816.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 5,149.
7 Add lines 5 and 6			7 536,965.
8 Enter qualifying distributions from Part XII, line 4			8 478,919.

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	10,297.
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	10,297.
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	10,297.
6 Credits/Payments:			
a 2012 estimated tax payments and 2011 overpayment credited to 2012	6a	6,120.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	7,000.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	13,120.	
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	2,823.	
11 Enter the amount of line 10 to be: Credited to 2013 estimated tax <input type="checkbox"/> 2,823. 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
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
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. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 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?	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> DE, MA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>WWW.LALORFOUND.ORG</u>	13	X	
14	The books are in care of ► <u>GMA FOUNDATIONS</u> Telephone no. ► <u>617-426-7080</u> Located at ► <u>77 SUMMER STREET, 8TH FLOOR, BOSTON, MA</u> ZIP+4 ► <u>02110</u>			
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 ► <u>15</u> N/A			
16	At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes	No X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<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)? Organizations relying on a current notice regarding disaster assistance check here	N/A	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? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 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	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 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

Organizations relying on a current notice regarding disaster assistance check here

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

N/A

☐ Yes ☐ No

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

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

x

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

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

N/A

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

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

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

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

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

0

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	
All other program-related investments. See instructions.	
3	

Total. Add lines 1 through 3

0

Form 990-PF (2012)

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	13,437,235.
b	Average of monthly cash balances	1b	122,449.
c	Fair market value of all other assets	1c	550.
d	Total (add lines 1a, b, and c)	1d	13,560,234.
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	13,560,234.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	203,404.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	13,356,830.
6	Minimum investment return. Enter 5% of line 5	6	667,842.

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	667,842.
2a	Tax on investment income for 2012 from Part VI, line 5	2a	10,297.
b	Income tax for 2012. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	10,297.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	657,545.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	657,545.
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	657,545.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	478,919.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	478,919.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	478,919.

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				657,545.
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only			17,733.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2012:				
a From 2007				
b From 2008				
c From 2009				
d From 2010				
e From 2011				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2012 from Part XII, line 4: ► \$ 478,919.				
a Applied to 2011, but not more than line 2a			17,733.	
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				461,186.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2011. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013				196,359.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2007 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2008				
b Excess from 2009				
c Excess from 2010				
d Excess from 2011				
e Excess from 2012				

N/A

- ☐ 4942(i)(3) or ☐ 4942(i)(5)

- (4) Gross investment income**

[illegible]Form **990-PF** (2012)

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)				
a Paid during the year				
AMERICAN SOCIETY OF ANDROLOGY 1100 E. WOODFIELD ROAD, SUITE 520 SCHAUMBURG, IL 60173	NONE	PUBLIC CHARITY	TRAVEL GRANT	5,000.
CHILDREN'S NUTRITION PROGRAM OF HAITI 1980 UNION AVENUE CHATTANOOGA, TN 37404	NONE	PUBLIC CHARITY	ANNA LALOR BURDICK PROGRAM	20,000.
CINCINNATI CHILDREN'S HOSPITAL 3333 BURNET AVE., MLC 7030 CINCINNATI, OH 45229	NONE	PUBLIC CHARITY	FELLOWSHIP	47,000.
COLUMBIA UNIVERSITY OFFICE OF SPONSORED FINANCE, PO BOX 29789 NEW YORK, NY 10032	NONE	PUBLIC CHARITY	FELLOWSHIP	5,000.
COMMUNITY HEALTH FOUNDATION 726 EXCHANGE STREET BUFFALO, NY 14210	NONE	PUBLIC CHARITY	ANNA LALOR BURDICK PROGRAM	15,000.
Total			SEE CONTINUATION SHEET(S)	416,500.
b Approved for future payment				
CINCINNATI CHILDREN'S HOSPITAL 3333 BURNET AVE., MLC 7030 CINCINNATI, OH 45229	NONE	PUBLIC CHARITY	FELLOWSHIP	5,000.
FUTURE NET, INC. 4000 WESTON PARKWAY, SUITE 204 WEST DES MOINES, IA 50266	NONE	PUBLIC CHARITY	ANNA LALOR BURDICK PROGRAM	25,000.
KASIISI PROJECT, INC. 64 LINNAEAN STREET CAMBRIDGE, MA 02138	NONE	PUBLIC CHARITY	ANNA LALOR BURDICK PROGRAM	16,000.
Total			SEE CONTINUATION SHEET(S)	126,000.

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
GORDON RESEARCH CONFERENCES 512 LIBERTY LANE WEST KINGSTON, RI 02892	NONE	PUBLIC CHARITY	FOR CONFERENCE ON MAMMALIAN GAMETOGENESIS	6,000.
HYDE SQUARE TASK FORCE 275 CENTRE STREET JAMAICA PLAIN, MA 02130	NONE	PUBLIC CHARITY	ANNA LALOR BURDICK PROGRAM	10,000.
IBIS REPRODUCTIVE HEALTH, INC. 17 DUNSTER STREET CAMBRIDGE, MA 02138	NONE	PUBLIC CHARITY	ANNA LALOR BURDICK PROGRAM	20,000.
MASSACHUSETTS ALLIANCE ON TEEN PREGNANCY 105 CHAUNCY STREET BOSTON, MA 02111	NONE	PUBLIC CHARITY	ANNA LALOR BURDICK PROGRAM	20,000.
MICHIGAN STATE UNIVERSITY CONTRACTS & GRANTS ADMINISTRATION, 301 ADMINISTRATION BUILDING EAST LANSING, MI 48917	NONE	PUBLIC CHARITY	FELLOWSHIP	5,000.
NATIONAL CAMPAIGN TO PREVENT TEEN & UNPLANNED PREGNANCY 1776 MASSACHUSETTS AVENUE, N.W., SUITE 200 WASHINGTON, DC 20036	NONE	PUBLIC CHARITY	ANNA LALOR BURDICK PROGRAM	25,000.
NATIVE AMERICAN COMMUNITY BOARD P.O. BOX 572 LAKE ANDES, SD 57356	NONE	PUBLIC CHARITY	ANNA LALOR BURDICK PROGRAM	20,000.
PRESIDENT & FELLOWS OF HARVARD COLLEGE HARVARD MEDICAL SCHOOL, 25 SHATTUCK STREET, SUITE 509 BOSTON, MA 02115	NONE	PUBLIC CHARITY	FELLOWSHIP	5,000.
SOCIETY FOR THE STUDY OF REPRODUCTION 1619 MONROE STREET MADISON, WI 53711	NONE	PUBLIC CHARITY	TRAVEL GRANT FOR 2013 ANNUAL MEETING	8,500.
TRUST WOMEN FOUNDATION, INC. 5107 EAST KELLOG ST. WICHITA, KS 67218	NONE	PUBLIC CHARITY	ANNA LALOR BURDICK PROGRAM	10,000.
Total from continuation sheets				324,500.

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
UNIVERSITY OF KANSAS MEDICAL CENTER 3901 RAINBOW BLVD., MSN 1039 KANSAS CITY, KS 66160	NONE	PUBLIC CHARITY	FELLOWSHIP	37,000.
UNIVERSITY OF MASSACHUSETTS AMHERST 70 BUTTERFIELD TERRACE AMHERST, MA 01003	NONE	PUBLIC CHARITY	FELLOWSHIP	37,000.
UNIVERSITY OF MICHIGAN 3003 WOLVERINE TOWER ANN ARBOR, MI 48109	NONE	PUBLIC CHARITY	FELLOWSHIP	37,000.
UNIVERSITY OF PENNSYLVANIA OFFICE OF RESEARCH SERVICES ROOM P-221, 3451 WALNUT STREET PHILADELPHIA, PA 19104	NONE	PUBLIC CHARITY	FELLOWSHIP	42,000.
WASHINGTON STATE UNIVERSITY SPONSORED PROGRAM SERVICES FRENCH, ADMINISTRATON BUILDING PULLMAN, WA 99163	NONE	PUBLIC CHARITY	FELLOWSHIP	5,000.
YALE UNIVERSITY 47 COLLEGE STRET, SUITE 216 NEW HAVEN, CT 06510	NONE	PUBLIC CHARITY	FELLOWSHIP	37,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Approved for Future Payment (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
NARAL PRO-CHOICE MASSACHUSETTS 15 COURT SQUARE, SUITE 900 BOSON, MA 02108	NONE	PUBLIC CHARITY	ANNA LALOR BURDICK PROGRAM	20,000.
NATIONAL INSTITUTE FOR MEDICAL RESEARCH FINANCE DEPARTMENT, THE RIDGEWAY, MILL HILL LONDON, UNITED KINGDOM NW71AA	NONE	PUBLIC CHARITY	FELLOWSHIP	5,000.
SADIE NASH LEADERSHIP PROJECT 157 MONTAGUE STREET, 4TH FLOOR BROOKLYN, NY 11201	NONE	PUBLIC CHARITY	ANNA LALOR BURDICK PROGRAM	20,000.
TEEN CONNECTION OF TAKOMA, INC. 1400 SPRING STREET, SUITE 200 SILVER SPRINGS, MD 20910	NONE	PUBLIC CHARITY	ANNA LALOR BURDICK PROGRAM	10,000.
UNIVERSITY OF KANSAS MEDICAL CENTER 3901 RAINBOW BLVD., MSN 1039 KANSAS CITY, KS 66160	NONE	PUBLIC CHARITY	FELLOWSHIP	5,000.
UNIVERSITY OF MASSACHUSETTS AMHERST 70 BUTTERFIELD TERRACE AMHERST, MA 01003	NONE	PUBLIC CHARITY	FELLOWSHIP	5,000.
UNIVERSITY OF MICHIGAN 3003 WOLVERINE TOWER ANN ARBOR, MI 48109	NONE	PUBLIC CHARITY	FELLOWSHIP	5,000.
UNIVERSITY OF PENNSYLVANIA OFFICE OF RESEARCH SERVICES ROOM P-221, 3451 WALNUT STREET PHILADELPHIA, PA 19104	NONE	PUBLIC CHARITY	FELLOWSHIP	5,000.
YALE UNIVERSITY 47 COLLEGE STRET, SUITE 216 NEW HAVEN, CT 06510	NONE	PUBLIC CHARITY	FELLOWSHIP	5,000.
Total from continuation sheets				80,000.

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

- | | | Yes | No |
|----------|--|-----|----|
| 1 | 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? | | |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of: | | |
| | (1) Cash | | X |
| | (2) Other assets | | X |
| b | Other transactions: | | |
| | (1) Sales of assets to a noncharitable exempt organization | | X |
| | (2) Purchases of assets from a noncharitable exempt organization | | X |
| | (3) Rental of facilities, equipment, or other assets | | X |
| | (4) Reimbursement arrangements | | X |
| | (5) Loans or loan guarantees | | X |
| | (6) Performance of services or membership or fundraising solicitations | | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | | X |
| d | 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** If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

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.

☐ **SECRETARY AND**
☐ **TREASURER**

Signature of officer or trustee: [Signature] Date: 5/7/14 Title: _____

return with the preparer shown below (see instr. 7)?
☒ **Yes** ☐ **No**

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	JOEL ARONSON, CPA	JOEL ARONSON, CPA	04/24/14		P01375551
	Firm's name ▶ ALEXANDER, ARONSON, FINNING, & CO., P.C.				Firm's EIN ▶ 04-2571780
	Firm's address ▶ 21 EAST MAIN STREET WESTBOROUGH MA 01581				Phone no. 508-366-9100

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DIVIDEND AND INTEREST INCOME	284,724.	0.	284,724.
OTHER INVESTMENT INCOME	6,532.	0.	6,532.
TOTAL TO FM 990-PF, PART I, LN 4	291,256.	0.	291,256.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	2
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	4,931.	0.		4,931.
TO FORM 990-PF, PG 1, LN 16B	4,931.	0.		4,931.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT ADVISORY	50,143.	50,143.		0.
GRANT MANAGEMENT	42,127.	0.		52,287.
INVESTMENT TRANSACTION FEES	0.	0.		0.
TO FORM 990-PF, PG 1, LN 16C	92,270.	50,143.		52,287.

FORM 990-PF	TAXES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAX AND EXCISE TAX	41,873.	2,112.		0.
TO FORM 990-PF, PG 1, LN 18	41,873.	2,112.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INSURANCE	1,200.	0.		1,200.
TELEPHONE AND OFFICE	503.	0.		503.
MEMBERSHIP	725.	0.		725.
POSTAGE & PRINTING	525.	0.		525.
GRANT COMMITTEE	1,990.	0.		1,990.
TO FORM 990-PF, PG 1, LN 23	4,943.	0.		4,943.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	6
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
U.S GOVERNMENT AND AGENCY OBLIGATIONS	x		0.	0.
TOTAL U.S. GOVERNMENT OBLIGATIONS				
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			0.	0.

FORM 990-PF	CORPORATE STOCK	STATEMENT	7
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCKS	9,781,245.	9,781,245.
TOTAL TO FORM 990-PF, PART II, LINE 10B	9,781,245.	9,781,245.

FORM 990-PF	CORPORATE BONDS	STATEMENT	8
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS	1,380,211.	1,380,211.
TOTAL TO FORM 990-PF, PART II, LINE 10C	1,380,211.	1,380,211.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	9
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MUTUAL FUNDS	FMV	2,387,167.	2,387,167.
TOTAL TO FORM 990-PF, PART II, LINE 13		2,387,167.	2,387,167.

FORM 990-PF

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

STATEMENT 10

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
LALOR BURDICK C/O GMA FOUNDATIONS, 77 SUMMER STREET, 8TH FLOOR BOSTON, MA 02110	SECRETARY AND TREASURER 1.00	0.	0.	0.
CAROL CHANDLER C/O GMA FOUNDATIONS, 77 SUMMER STREET, 8TH FLOOR BOSTON, MA 02110	TRUSTEE 0.50	0.	0.	0.
CYNTHIA PATTERSON C/O GMA FOUNDATIONS, 77 SUMMER STREET, 8TH FLOOR BOSTON, MA 02110	PRESIDENT 0.50	0.	0.	0.
SALLY ZECKHAUSER C/O GMA FOUNDATIONS, 77 SUMMER STREET, 8TH FLOOR BOSTON, MA 02110	TRUSTEE 0.50	0.	0.	0.
ANDREW BRAUN C/O GMA FOUNDATIONS, 77 SUMMER STREET, 8TH FLOOR BOSTON, MA 02110	TRUSTEE 0.50	0.	0.	0.
CHRISTOPHER BURDICK C/O GMA FOUNDATIONS, 77 SUMMER STREET, 8TH FLOOR BOSTON, MA 02110	TRUSTEE 0.50	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

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Application Forms

>> Fellowship Application Form <<

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Application Guidelines

Guidelines

Mission and Purpose

The Anna Lalor Burdick Program seeks to educate young women about healthy reproduction in order to broaden and enhance their options in life.

The program focuses particularly on young women who have inadequate access to information regarding sexual and reproductive health, including comprehensive and unbiased information on contraception and pregnancy termination.

Eligibility

To be eligible applicants must be tax exempt under section 501(c)(3) of the U.S. Internal Revenue Service Code and defined as "not a private foundation" under section 509(a) of the Code.

While projects may take place outside the U.S., the Anna Lalor Burdick program will only fund organizations based in the United States.

Funding Interests

- Programs for young women, particularly those who are disadvantaged by poverty, discrimination, geographic isolation, or other factors leading to inadequate reproductive health education
- Programs that include a comprehensive approach to sexual and reproductive health education
- Programs that include novel ideas, including innovative methods of delivering information
- Programs at new or smaller organizations, including those with a grassroots base, that are capable of delivering excellent services
- Well defined projects at larger organizations if they add a new dimension or capability
- Programs that will be exemplars for replication if successful
- Programs that will be economically sustainable if they succeed

Selection Preferences

- Sexual and reproductive health education should be the centerpiece of the program's work
- Expanding young women's reproductive options should be the target, but the program may involve young men as well for that purpose
- New programs or innovation in successful existing programs
- Well developed plans for sustainability
- Clear definition of project goals and intended outcomes and a feasible plan to assess impact and success
- Collaborative efforts, including evidence of participation by proposed partner organizations
- Demonstration of plans to share outcomes and successful techniques or products

Geographic Focus

The program has no geographic limits.

Funding Availability and Duration

The trustees award a small number of grants in the range of \$10,000 to \$50,000, with an average grant size between \$20,000 and \$25,000.

Grants are awarded for one year. On rare occasions, trustees invite follow-up work to a project that has shown outstanding results or promise during its first year.

Areas Where Grants Are Not Normally Made

To individuals, or for individual research projects and scholarships

To requests for endowment or major capital support

General operating support for ongoing programs

Application Procedures

The first step in applying for a grant is to submit an online concept paper. Instructions for preparing an online concept application are found at the Application Instructions tab on the left side of this screen. Concept papers are submitted online only.

If your concept paper is approved by the trustees, you will be invited to submit a full proposal.

Deadlines

Deadlines for concept papers are May 1 and November 1. The online portal will open one month prior to the concept paper deadline.

Applicants will be informed within 6-8 weeks of the deadline date of the trustees' decision regarding the concept paper.

Applicants invited to submit a full proposal will receive a full set of instructions to assist in preparation of a full online proposal.

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Application Instructions

The Anna Lalor Burdick Concept Paper application uses an online process.

Please click [here](#) for application instructions and a link to the application website. The online portal will open one month prior to the concept paper deadline.

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Online Application Guide

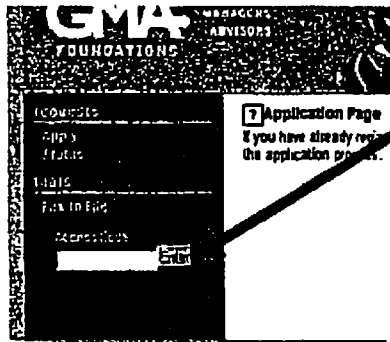
First Read the Anna Lalor Burdick Program guidelines to determine your eligibility.

Register Prior to submitting a concept application through the foundation's online grants system, applicants must complete a one-time registration. Previously registered applicants can simply log in. You only need to register once for all GMA Foundations clients. Please do not register your organization more than once.

To register, you will need to supply your contact information and create a password to log in to the system. The foundation prefers that the principal investigator or primary contact register.

Be sure to save your password where you can find it again. You will need it to work on proposal drafts and to submit reports if you receive a grant.

If you are a grant writer, please register using the name and email address of the principal investigator or primary contact at the organization for which you are applying. If you use your own information, the organization information will be linked to your email address, which will cause a problem if you then try to fill out an application for another organization or if you move on and the organization wishes to re-apply or submit a report.



Click Apply Once you are in the system, click *Apply* on the top left side of your screen, see illustration.

Enter Access Code The Access Code routes your proposal to the foundation. Each of GMA's foundation clients has its own Access Code; it is *not* the same as your password. Enter the code: *albconcept* (all lowercase) in the Access Code box on the middle left side of your screen.

Click Link to Open Form Click *Enter* to open the application form. If you would like to review the questions prior to starting your application, click on *Print Question Legend*, located above your name, to get a list of the proposal questions.

Draft Application Complete your online application. Save frequently. If you want to leave your application before it is complete, click on *Save as Draft* at the bottom of the page; the next screen will confirm that you have saved your application. If you do not see the confirmation, there is an error on your page that needs to be fixed before you can continue. You can come back later and continue your application by signing in with your password and continuing to work on the application.

Submit When Complete Your application must be submitted when you are done in order to remove it from draft status. After clicking *Submit*, a new screen will appear confirming receipt of your application. You cannot make changes after submitting your application. If you do not see the confirmation, there is an error on your page that needs to be fixed before you can continue.

Click here to link to the online concept paper application:

<https://www.grantinterface.com/Common/LogOn.aspx?eqs=3QVv173peTkm1XKibu7wUq2>

Tips for Using the System

Can't find the application form? If you don't see the link to the application form, you probably did not enter the access code in the field on the left side of your screen after you registered and logged in.

Make a PDF of your proposal. If you would like make a pdf of your submission, use the Print Packet function. You can choose to save or print this pdf for your records.



Print Packet

Uploading? The upload fields accept only one document. If you upload the wrong document, simply browse and upload the right one to overwrite the incorrect upload. Once you see the name of the document you want to upload in the grey box, scroll to the bottom of the page and click Save as Draft. You will know that the upload worked when you see the document link below the grey box. You will also see it when you use the Print Packet function.

Cutting and pasting is fast. Cutting and pasting directly from your word processor is easy if you keep in mind that 3,200 characters (including spaces) equal approximately one page with four paragraphs in 12 point type. To facilitate cutting and pasting, text limits are typically generous, but do not feel compelled to write more than necessary just to use all of the characters allowed. Please note: If you choose to cut and paste, hit the space bar after pasting to ensure the system counts your characters properly.

Forget formatting. The system removes all formatting from your pasted text. It will turn bullets into gibberish. Saving your documents in RTF before you paste will require less clean-up in your proposal.

What is the deadline? The Anna Lator Burdick Program has two application rounds per year. The deadlines are May 1 and November 1 with a firm receipt time before 12:00 midnight Eastern Time on the date specified. If the deadline dates fall on a weekend or holiday, the date is extended to the next regular working day.

Did we get it? Once you click Submit, your proposal is on its way. Log in to check the status of your proposal submission. If you see Awaiting Foundation Action beside the project name, your proposal was submitted properly.

Need tech support? Tech support is available between 9:00 a.m. and 4:00 p.m. Eastern Time. Call the Grants Manager at GMA Foundations at 617-391-3085 or email online@gmafoundations.com.

Have suggestions? Write online@gmafoundations.com with comments, tips and ideas that can improve this system. Your feedback helps us make improvements.

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Application Guidelines

The Lalor Foundation postdoctoral fellowship program supports promising new researchers in establishing scientific and teaching careers. The mission of the program is to support these researchers early in their work so that they can become independently funded in the field of mammalian reproductive biology as related to the regulation of fertility.

Eligibility of Institutions and Individuals

U.S. institutions must be exempt from federal income taxes under Section 501(c)(3) of the U.S. Internal Revenue Code and must submit a determination letter from the Internal Revenue Service stating that it is "not a private foundation."

If the institution is not located in the United States and has not been classified by the Internal Revenue Service, please contact the fellowship manager at GMA Foundations at the address below.

The individual nominated by the applicant institution for the postdoctoral fellowship for conduct of the work may be a citizen of any country. The individual should have training and experience at least equal to the Ph.D. or M.D. level and should not have a faculty appointment (i.e., instructor, lecturer or higher). Potential fellows should not have held the doctoral degree more than two years from receipt of the degree.

The applicant institution may make its nomination of a fellow from among its own personnel or elsewhere, but qualifications being equal, candidates from other than the proposing institution itself may carry modest preference. The application must name the institution's nominee for fellowship and include his or her performance record. Only one application per laboratory/sponsor will be considered.

Financial Data

Fellowships will be \$42,000 per year for coverage of fellowship stipend, fringes and institutional overhead. Other expenses are not allowed. Institutional overhead may not exceed 10 percent of the total fellowship award. Renewal for one additional year is possible under special circumstances. Please see specific renewal guidelines.

Feel free to contact fellowshipmanager@gmafoundations.com with any questions.

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Application Instructions

NEW FOR 2013 APPLICATIONS

This year's deadline is midnight eastern standard time Tuesday, January 15. The online registration portal will open in September.

Lalor Foundation Fellowship Online Registration Guide

Read the Eligibility Guidelines: Before registering, read the guidelines for the postdoctoral fellowship program to be sure that you and your institution are eligible and that your proposed research topic aligns with the foundation's priorities.

Register: Prior to submitting a paper proposal to the Lalor Foundation, applicants must complete a one-time online registration. After completing the registration, you can simply log in.

You will need to supply your contact information and create a password to log in. The foundation prefers that the proposed fellow register. **Do not create more than one registration.** If you have questions about registration, contact technical support (below in Tips for Using Registration System).

Be sure to *save your password where you can find it again*. You will need it to work on your application abstract, budget and Appendix C draft and to submit reports if your application is approved.

Click Apply: After you have registered, click *Apply* on the upper left side of your screen.

Enter Access Code: The Access Code routes your registration information to the foundation. The Access Code is *not* the same as your password. Enter the code *fellow* (all lowercase) in the Access Code box on the middle left side of your screen.

Click Link to Open Form: Click Enter to open the application abstract space, budget and Appendix C upload.

Save frequently. If you want to leave your application before it is complete, click on *Save as Draft* at the bottom of the screen; the next screen will confirm that you have saved your application. If you do not see the confirmation, there is an error on your page that needs to be fixed before you can continue. You can come back later and continue by signing in *with your password* and continuing to work on the registration material.

Please Type Carefully: Resist the urge to type in full caps. Also, please use initial caps for names and titles. What you type is what the Scientific Review Committee will read.

Submit When Complete: Check your registration materials carefully while in draft. You will not be able to make changes to the registration materials after clicking submit. Click *submit* once when you are done in order to remove the material from draft status. After clicking submit, a new screen will appear confirming receipt of the application abstract, budget and Appendix C. If you do not see the confirmation, there is an error on your page that needs to be fixed before you can submit.

This information will become your cover sheet and does not need to be printed and submitted with the rest of your application packet (see below). The foundation will export this information into a cover sheet that will then be added to the rest of your packet when it is received.

Tips for Using the Registration System

Can't find the application form? If you don't see the application questions, you probably did not enter the access code in the field on the left side of your screen after you registered and logged in.

Make a PDF of your application. If you would like make a pdf of your submission for your own use, use the Print Packet function. You can choose to save or print this pdf for your records. Do not send us a copy of the Print Packet. Before clicking "submit," review your application abstract, budget and Appendix C draft.

What is the deadline? The deadline for *receipt of all* registration *and* paper application materials is midnight eastern standard time on January 15. If January 15 falls on a weekend, the deadline date will be the following Monday.

Did we get it? Once you click *submit*, your registration materials are on their way – *you can't edit your draft any more*. After you submit your registration material, you can log in to check the status of your submission.

Need tech support? Tech support is available between 9:00 a.m. and 4:00 p.m. eastern standard time. Call the Grants Manager at GMA Foundations at 617-391-3085 or email online@gmafoundations.com.

Suggestions for improving registration? Write online@gmafoundations.com with comments, tips and ideas that can improve this system. Your feedback helps us make improvements.

Go to the login page: Click the link to go to the online registration portal to prepare your application abstract, budget and Appendix C. <https://www.grantinterface.com/gma/Common/LogOn.aspx>

After You Have Completed Your Online Registration, Continue With the Body of the Application Below.

INSTRUCTIONS FOR POSTDOCTORAL FELLOWSHIP APPLICATION

After completing the online registration, please continue with the body of the application, which should be filled out completely and submitted with the Appendices described below.

1. The proposed fellow is responsible to see that the signed, completed application and all supporting information is RECEIVED by the foundation not later than midnight eastern standard time on January 15 each year. In the event that January 15 falls on a weekend or holiday, the next working day is the deadline date.
2. The application and all material submitted should be typewritten on 8 1/2" x 11" or A4 paper. Please do not change the font size or margins of the forms provided. The narrative portion of the application should have 1" margins all the way around, except that applicants using A4 paper should leave 1.5" at the bottom of each page. The prospective fellow's name should appear in the upper right hand corner of each page. Forms are available online, but proposals should be submitted in hard copy.
3. The application should be accompanied by the applicant's official doctoral transcript. The applicant should also complete the NIH Biographical Sketch form.
4. One original and 4 copies of the application and accompanying documents should be addressed to the Fellowship Manager, The Lalor Foundation, Inc., c/o GMA Foundations, 77 Summer Street, 8th Floor, Boston, MA 02110-1006 USA. To reduce the volume of paper, please *print double sided whenever possible*. Applications should be held by clips or rubber bands, no staples please; folders, report covers, or other types of binders do not fit files and are discarded.

APPENDICES: The paper application consists of three appendices as follows:

Appendix A – Project Narrative (5 pages only including figures and references)

1. The plan of work for the project should concisely describe the present state of knowledge regarding the problem, the scope, specific objectives and importance of the work which will be accomplished during the period.
2. Please outline in what fashion this research can potentially be applied to the regulation of human fertility or to a method of birth control. This information may be helpful in making a choice between applications which are equally attractive from a purely scientific point of view.

Appendix B – Letters of Support (Send 1 confidential, sealed envelope of each. Letters will be opened and copied at the foundation.)

1. Independent Expert Reviews: The applicant should contact two independent experts who will review the proposal, comment on its scientific merit and give their opinion of the ability of the lab to supervise and support the project. These reviewers should be experts in the field who do not know the applicant personally and should state their own qualifications to perform the review. Representatives of any institutional unit that stands to receive financial benefit from a fellowship are not considered to be independent reviewers. Preference is for reviewers from outside the applicant's institution. The instructions and form included in this application material should be sent to the expert reviewers. These letters are not required of renewal applicants.

2. Reference: The applicant should also submit one letter of reference from someone who does know the applicant's work and who can comment on the applicant's abilities as a researcher. This should not be the person who will be the mentor/sponsor on the project but, rather, someone like a dissertation advisor or committee member. Representatives of any institutional unit that stands to receive financial benefit from a fellowship are not considered to be appropriate references. The instructions and form included in this application material should be sent to the reference. This letter is not required for renewal applicants.

3. The applicant should request a letter from the proposed sponsor/mentor outlining in layman's terms the relevance/importance of the project to the foundation's focus; the training/experiences during the project that will assist the fellow to apply successfully for continuing funding and to progress toward independence; the ability of the fellow to carry out the proposed project. The sponsor/mentor should prepare the letter of support utilizing the instructions included in this application material. If there will be more than one sponsor/mentor, they should collaborate to produce one letter of support, signed by both, and they should outline how they will coordinate supervision of the applicant's progress. Joint sponsorships may occur but are not usual. See below for renewal applicants' sponsor/mentor letter.

All letters should be sent *to the applicant* for inclusion in the proposal packet. These letters should be on the forms provided in these instructions and in sealed envelopes, marked "Confidential," and signed by the reviewer across the envelope flap. All letters of support should include the NIH Biographical Sketch of the person writing the review. Proposals are not complete without these letters. Please plan ahead; emailed letters are not confidential and are not acceptable. In fairness to all applicants, do not include extra letters of support.

Appendix C – Institutional Representation

This appendix is the final part of the online registration materials and sets forth information concerning the institution's eligibility to receive grants under U.S. tax laws and approvals of the project by reviewing bodies. Please print Appendix C, obtain appropriate signatures and include with the application materials.

The application forms can be found [here](#).

Renewal Applications

Fellowship renewals are not automatic; renewal applications are reviewed along with the pool of new applicants.

1. Update your online application information. (See instructions above.) Print an original and 4 copies of Appendix C and include it with your application packet.
2. Submit an original and 4 copies of your progress report on the project thus far and a narrative description of the work planned for a second year, not exceeding five pages including figures and references.
3. Your sponsor should report in layman's terms on progress toward the mentoring and training activities planned for the first year. The sponsor should indicate:
 - the relevance/importance of the project's potential second year to the foundation's focus on the regulation of fertility,
 - comment on the first year's work, including how much of the first-year project was accomplished and what training took place in the first year,
 - barring unforeseen circumstances, how likely is it that the proposed work can be accomplished within the term of the fellowship?
 - the training/experiences during a second year that will assist the fellow to progress toward successful funding and independence,
 - and the fellow's ability to accomplish the goals of the proposed project.
4. Additional letters of reference are not required for renewal applications.
5. Both the renewal applicant and sponsor should submit their updated NIH Biographical Sketches.

The Lalor Foundation c/o GMA Foundations | 77 Summer St. 8th Floor | Boston, MA | 02110 | 617-426-7080 X 323

Applicant Name (Last, First, Middle Initial)

Appendix A: Attach a Project Narrative. Limit 5 pages, including figures and references. Do not alter font size or margins. Include the applicant's name at the top right of each page, last name first.

Applicant Name (Last, First, Middle Initial)

APPENDIX B. 4 Letters of Support and Biographical Information

BIOGRAPHICAL SKETCH

Provide the following information for the key personnel and other significant contributors in the order listed on Form Page 2.
Follow this format for each person. **DO NOT EXCEED FOUR PAGES.**

NAME		POSITION TITLE	
eRA COMMONS USER NAME (credential, e.g., agency login)			
EDUCATION/TRAINING (Begin with baccalaureate or other initial professional education, such as nursing, and include postdoctoral training.)			
INSTITUTION AND LOCATION	DEGREE (if applicable)	YEAR(s)	FIELD OF STUDY

NOTE: The *Biographical Sketch* may not exceed four pages.

- A. Positions and Honors.** List in chronological order previous positions, concluding with your present position. List any honors. Include present membership on any Federal Government public advisory committee.
- B. Selected peer-reviewed publications (in chronological order).** Do not include publications submitted or in preparation. For publicly available citations, URLs or PMC submission identification numbers may accompany the full reference; copies of publicly available publications are not accepted as appendix material.
- C. Research Support.** List selected ongoing or completed (during the last three years) research projects (federal and non-federal support). Begin with the projects that are most relevant to the research proposed in this application. Briefly indicate the overall goals of the projects and your role (e.g., PI, Co-Investigator, Consultant) in the research project. Do not list award amounts or percent effort in projects.

Applicant Name (Last, First, Middle Initial)

THE LALOR FOUNDATION, INC.

(617) 426-7080, Ext. 323 - WWW.LALORFOUND.ORG

Guidelines for Confidential Letter of Review for Postdoctoral Fellowship

Dear Expert Reviewer: Thank you for agreeing to serve as an independent expert reviewer of this postdoctoral fellowship application to the Lalor Foundation. Independent reviewers should be experts in the field *who do not know the applicant personally*. In order to ensure that we have comparable information for each applicant, we ask that you address the following points in your review:

1. Briefly state your area of expertise in reproductive biology, and attach your NIH Biographical Sketch (PHS Form 398/2590).
2. Assess the quality of the candidate applying for the fellowship.
3. Assess the scientific quality of the proposal, list strengths as well as weaknesses. We are interested in the originality, practicability, and value of the proposed project.
4. Barring unforeseen circumstances, how likely is it that the proposed work can be accomplished within the term of the fellowship?
5. Comment on the sponsor/mentor's laboratory.

Please mail your confidential review to the applicant for inclusion in the proposal package. Reviews should be mailed in a sealed envelope, marked "Confidential," and you should sign across the back flap of the envelope after it has been sealed. Reviews should reach the applicant in time for the entire proposal package to be mailed by the applicant and received at the foundation by January 15.

The Lalor Foundation greatly appreciates your willingness to accept the responsibility of this review. The foundation's Scientific Review Committee gives considerable weight to the independent reviews. Thank you for your time.

Sincerely,
Fellowship Manager
The Lalor Foundation

INDEPENDENT PROPOSAL REVIEW

- Assessment of Sponsor/Lab:**

Applicant Name (Last, First, Middle Initial)

THE LALOR FOUNDATION, INC.

(617) 426-7080, Ext. 323 - WWW.LALORFOUND.ORG

Guidelines for Confidential Letter of Reference for Postdoctoral Fellowship

Dear Referee: Thank you for agreeing to serve as a reference for this applicant for a Lalor Foundation postdoctoral fellowship. Referees should be familiar with the applicant's scientific strengths and weaknesses and often are members of the applicant's dissertation committee. In order to ensure that we have comparable information for each applicant, we ask that you address the following points in your review:

1. Briefly state your area of expertise in reproductive biology, and attach your NIH Biographical Sketch (PHS Form 398/2590).
2. Please take up to three pages to prepare your reference. In what capacity do you know the candidate applying for the fellowship? Assess the strengths and weaknesses of the candidate and your assessment of the candidate's ability to carry out the proposed work within the fellowship period. We are also interested in your opinion of how this project may strengthen the candidate's ability to progress in the field of reproductive biology.

Please mail your confidential reference to the applicant for inclusion in the proposal package. References should be mailed in a sealed envelope, marked "Confidential," and you should sign across the back flap of the envelope after it has been sealed. References should reach the applicant in time for the entire proposal package to be mailed by the applicant and received at the foundation by January 15.

The Lalor Foundation greatly appreciates your willingness to accept the responsibility of this reference. The foundation's Scientific Review Committee gives considerable weight to the independent reviews and references. Thank you for your time.

Sincerely,
Fellowship Manager
The Lalor Foundation

Applicant Name (Last, First, Middle Initial)

CANDIDATE REFERENCE

1. Referee's Name:
2. Title:
3. Department:
4. Institution:
5. Address:
6. Address:
7. City, State, Zip:
8. Phone: Email:

Confidential Assessment of (name)

Applicant Name (Last, First, Middle Initial)

THE LALOR FOUNDATION, INC.

(617) 426-7080, Ext. 823 - WWW.LALORFOUND.ORG

SPONSOR/MENTOR'S LETTER OF SUPPORT

Dear Proposed Sponsor/Mentor: Please cover the points outlined on the application specifications, Appendix B, No. 3 and attach your NIH Biographical Sketch to your letter. The applicant should include your letter in the proposal packet which is *due in the foundation's office* by 5:00 p.m. on January 15. Proposals are not complete without all of the letters of evaluation.

By nature, applicants are optimistic and ambitious with regard to their research. Please work with the applicant to see that, barring unforeseen circumstances, the scope of work proposed can reasonably be accomplished in the term of the fellowship.

Your support and guidance will be of utmost importance to the applicant in the event that a fellowship is awarded. Thank you for sponsoring this applicant's efforts to become an independent researcher in the field of reproductive biology.

Sincerely,

Fellowship Manager
The Lalor Foundation

Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

► **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions) For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

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
	THE LALOR FOUNDATION, INC.	51-6000153
	Number, street, and room or suite no. If a P O box, see instructions	Social security number (SSN)
	77 SUMMER STREET, 8TH FLOOR	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions	
	BOSTON, MA 02110	

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-T (corporation)	07
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

GMA FOUNDATIONS

- The books are in the care of ► 77 SUMMER STREET, 8TH FLOOR - BOSTON, MA 02110
Telephone No. ► 617-426-7080 FAX No ► 617-522-2799
- 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

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until MAY 15, 2014, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
► ☐ calendar year _____ or
► ☒ tax year beginning OCT 1, 2012, and ending SEP 30, 2013

- 2 If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
☐ Change in accounting period

3a 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.	3a	\$	11,284.
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.	3b	\$	4,284.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	7,000.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

LHA For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form **8868** (Rev. 1-2013)