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Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

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Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning

, and ending

Name of foundation

A Employer identification number

EVERETT FOUNDATION FOR AGED PERSONS INC

04-2062107

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

Room/suite

C/O ROBERT BOYNTON 581 BOYLSTON ST

702

B Telephone number

617 536-4868

City or town, state or province, country, and ZIP or foreign postal code

BOSTON, MA 02116-3608

C If exemption application is pending, check here ☐

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeD 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test, check here and attach computation ☐

H Check type of organization:

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundationE If private foundation status was terminated under section 507(b)(1)(A), check here ☐

I Fair market value of all assets at end of year

J Accounting method: ☒ Cash ☐ AccrualF If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

(from Part II, col. (c), line 16)

☐ Other (specify)

\$ 2,495,365. (Part I, column (d) must be on cash basis.)

Part I Analysis of Revenue and Expenses

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

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

Revenue	1 Contributions, gifts, grants, etc., received			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	160.	160.		STATEMENT 1
	4 Dividends and interest from securities	63,961.	63,961.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	10,539.			
	b Gross sales price for all assets on line 6a	135,454.			
	7 Capital gain net income (from Part IV, line 2)		10,539.		
	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	74,660.	74,660.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	8,000.	0.		8,000.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees	9,000.	4,500.		4,500.
	c Other professional fees				
	17 Interest				
	18 Taxes	1,876.	0.		1,876.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses	24,248.	23,220.		1,028.
	24 Total operating and administrative expenses. Add lines 13 through 23	43,124.	27,720.		15,404.
	25 Contributions, gifts, grants paid	85,650.			85,650.
26 Total expenses and disbursements. Add lines 24 and 25	128,774.	27,720.		101,054.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	<54,114.>				
b Net investment income (if negative, enter -0-)		46,940.			
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	20,245.	28,692.	28,692.
	2 *Savings and temporary cash investments	233,274.	209,686.	209,686.
	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	264,737.	214,569.	277,068.
	b Investments - corporate stock STMT 8	509,004.	562,469.	896,690.
	c Investments - corporate bonds STMT 9	705,096.	679,397.	717,931.
	11 Investments - land, buildings, and equipment: basis ▶			
Less: accumulated depreciation ▶				
12 Investments - mortgage loans STMT 10	22,253.	10,140.	11,230.	
13 Investments - other STMT 11	249,707.	245,249.	354,068.	
14 Land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)	2,004,316.	1,950,202.	2,495,365.	
Liabilities	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.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input checked="" type="checkbox"/> X and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	2,004,316.	1,950,202.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here <input type="checkbox"/>			
	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	2,004,316.	1,950,202.	
	31 Total liabilities and net assets/fund balances	2,004,316.	1,950,202.	

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	2,004,316.
2 Enter amount from Part I, line 27a	2	<54,114.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1,950,202.
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	1,950,202.

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 SHORT TERM SALES - LIST ATTACHED	P		
b LONG TERM SALES - LIST ATTACHED	P		
c CAPITAL GAINS DIVIDENDS			
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 9,629.		7,047.	2,582.
b 124,164.		117,868.	6,296.
c 1,661.			1,661.
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			2,582.
b			6,296.
c			1,661.
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	10,539.
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))
2012	101,656.	2,006,000.	.050676
2011	93,750.	2,331,970.	.040202
2010	128,934.	2,332,019.	.055289
2009	154,872.	2,257,431.	.068605
2008	133,557.	2,509,237.	.053226

2 Total of line 1, column (d)	2	.267998
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	.053600
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	1,963,002.
5 Multiply line 4 by line 3	5	105,217.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	469.
7 Add lines 5 and 6	7	105,686.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.	8	101,054.

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	939.
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	939.
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	939.
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	1,440.	
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	1,440.	
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	501.	
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax <input type="checkbox"/> 501. 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 the 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
1c 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.	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? If "Yes," attach a conformed copy of the changes	3	X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	X
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? If "Yes," attach the statement required by General Instruction T.	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? If "Yes," complete Part II, col. (c), and Part XV	7	X
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> 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	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 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV	9	X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	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?	13		X
Website address ► N/A				
14	The books are in care of ► NANCY GIARDINO, TREASURER Telephone no. ► 617 536-4868			
Located at ► 57 BLAINE ST, MALDEN, MA		ZIP+4 ► 02147		
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 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►				X

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	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 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
If "Yes," list the years ►			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
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 2013 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 2013.)	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 2013?	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)?

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 12		8,000.	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	
All other program-related investments. See instructions.	
3	

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	1,727,446.
b	Average of monthly cash balances	1b	265,449.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,992,895.
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	1,992,895.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	29,893.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,963,002.
6	Minimum investment return. Enter 5% of line 5	6	98,150.

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	98,150.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	939.
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	939.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	97,211.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	97,211.
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	97,211.

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	101,054.
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	101,054.
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	101,054.

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 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				97,211.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			84,748.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2013:				
a From 2008				
b From 2009				
c From 2010				
d From 2011				
e From 2012				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2013 from Part XII, line 4: ▶ \$ 101,054.				
a Applied to 2012, but not more than line 2a			84,748.	
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 2013 distributable amount				16,306.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2013 (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:	0.			
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 2012. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				80,905.
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 2008 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
d Excess from 2012				
e Excess from 2013				

N/A

- b** Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(j)(3) or ☐ 4942(j)(5)

- (4) Gross investment income

[illegible]

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

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
CAMBRIDGE HEALTH ALLIANCE			NURSES ACTIVITIES WITHIN EVERETT	60,000.
COMMUNITY FAMILY			HELP FOR EVERETT SENIORS	2,000.
COUNCIL OF AGING			HELP FOR EVERETT SENIORS	11,000.
EVERETT REHAB			HELP FOR EVERETT SENIORS	2,500.
FRIENDS OF THE EVERETT LIBRARY			HELP FOR EVERETT SENIORS	1,000.
Total	SEE CONTINUATION SHEET(S)			85,650.
b Approved for future payment				
NONE				
Total				0.

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)
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount		Related or exempt function income
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	160.		
4 Dividends and interest from securities			14	63,961.		
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			14	1,661.		8,878.
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.		65,782.		8,878.
13 Total. Add line 12, columns (b), (d), and (e)					13	74,660.

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

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

[illegible]

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 | 1a(1) | X |
| | (2) Other assets | 1a(2) | X |
| b | Other transactions: | | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b(1) | X |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | X |
| | (3) Rental of facilities, equipment, or other assets | 1b(3) | X |
| | (4) Reimbursement arrangements | 1b(4) | X |
| | (5) Loans or loan guarantees | 1b(5) | X |
| | (6) Performance of services or membership or fundraising solicitations | 1b(6) | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | 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		

**Sign
Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information

 | 7-9-14

Signature of officer or trustee Date

Date _____

Title

May the IRS discuss this return with the preparer shown below (see instr)?

☒ Yes ☐ No**Paid
Preparer
Use Only**

Print/Type preparer's name	
----------------------------	--

Preparer's signature

Date	
------	--

Check ☒ self-employed

PTIN	
------	--

ROBERT F BUYNTOU

W. E. B. DuBois

07/9/2020

P01440678

Firm's name ▶ **ROBERT F BOYNTON CPA**

Firm's EIN ► 04-3293698

Firm's address ► 581 BOYLSTON STREET SUITE 702
BOSTON, MA 02116-3608

Phone no. **617-536-4868**

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
HALLMARK HOSPICE			HELP FOR EVERETT SENIORS	2,000.
MYSTIC VALLEY HEALTH			HELP FOR EVERETT SENIORS	4,000.
WOODLAWN NURSING HOMES			HOLIDAY ACTIVITIES & AMBULANCE TOURS FOR RESIDENTS	3,150.
Total from continuation sheets				9,150.

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

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
MONEY MARKET	160.	160.	
TOTAL TO PART I, LINE 3	160.	160.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
CORP BONDS	28,738.	0.	28,738.	28,738.	
STOCKS	22,026.	1,661.	20,365.	20,365.	
US TREASURY	14,858.	0.	14,858.	14,858.	
TO PART I, LINE 4	65,622.	1,661.	63,961.	63,961.	

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	9,000.	4,500.		4,500.
TO FORM 990-PF, PG 1, LN 16B	9,000.	4,500.		4,500.

FORM 990-PF TAXES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAX	1,876.	0.		1,876.
TO FORM 990-PF, PG 1, LN 18	1,876.	0.		1,876.

FORM 990-PF

OTHER EXPENSES

STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OFFICE EXPENSE	299.	0.		299.
TRUSTEE MEETING EXPENSE	679.	0.		679.
MA FILING FEE	50.	0.		50.
BANK MANAGEMENT FEE	23,220.	23,220.		0.
TO FORM 990-PF, PG 1, LN 23	24,248.	23,220.		1,028.

FOOTNOTES

STATEMENT 6

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	7
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
US GOVERNMENT - LIST ATTACHED	X		214,569.	277,068.
TOTAL U.S. GOVERNMENT OBLIGATIONS			214,569.	277,068.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			214,569.	277,068.

FORM 990-PF	CORPORATE STOCK	STATEMENT	8
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORP STOCK - LIST ATTACHED	562,469.	896,690.
TOTAL TO FORM 990-PF, PART II, LINE 10B	562,469.	896,690.

FORM 990-PF	CORPORATE BONDS	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORP BONDS - LIST ATTACHED	679,397.	717,931.
TOTAL TO FORM 990-PF, PART II, LINE 10C	679,397.	717,931.

FORM 990-PF	MORTGAGE LOANS	STATEMENT	10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
MORTGAGE LOANS - LIST ATTACHED	10,140.	11,230.
TOTAL TO FORM 990-PF, PART II, LINE 12	10,140.	11,230.

FORM 990-PF		OTHER INVESTMENTS		STATEMENT	11
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE		
OTHER INVESTMENTS - LIST ATTACHED	FMV	245,249.	354,068.		
TOTAL TO FORM 990-PF, PART II, LINE 13		245,249.	354,068.		

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT 12
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
GEORGE AHLIN 21 TRENTON STREET MELROSE, MA 02176	PRESIDENT, DIRECTOR 4.00	2,400.	0.	0.
MARJORIE L. DACKO 7 FOSTER STREET EVERETT, MA 02149	CLERK, DIRECTOR 2.00	2,400.	0.	0.
ROSEMARIE IMPRESCIA 3 CARDIGAN ROAD PEABODY, MA 01960	DIRECTOR 1.00	400.	0.	0.
ALFRED SEAWARD 12 HAVERHILL ROAD ATKINSON, NH 03811	DIRECTOR 1.00	0.	0.	0.
LAURA WHITE 109 CLEVELAND AVENUE EVERETT, MA 02149	DIRECTOR 1.00	0.	0.	0.
NANCY GIARDINO 57 BLAINE STREET MALDEN, MA 02148	TREASURER, DIRECTOR 3.00	2,400.	0.	0.
ANN AHLIN 21 TRENTON STREET MALDEN, MA 02176	DIRECTOR 1.00	400.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		8,000.	0.	0.

EVERETT FOUNDATION FOR AGED PERSONS INC

BONDS

FOR THE YEAR ENDED 12-31-13

FORM 990-PF PART II LINES 10a, 10c and 12

INVESTMENT	BOOK VALUE 01/01/2013	BOOK VALUE 12/31/2013	MKT VALUE 12/31/2013
US TREASURY 6.25% DUE 8-15-23	190,018	190,018	244,061
US TREASURY SEC STRIPPED 2-15-18	23,131	24,551	33,007
US TREASURY 3.125% 09-30-13	51,588	0	0
TOTAL US OBLIGATIONS LINE 10a	\$264,737	\$214,569	\$277,068
BURLINGTON NORTHN SANTA FE 5.65% (49,238	49,238	56,076
CISCO SYS INC 4.45% 01/15/20	51,521	51,521	54,534
CITIGROUP INC 6.375% 08/12/14	53,141	53,141	51,681
COCA COLA 1.8% 09/01/16	25,751	25,751	25,601
COCA COLA 1.65% 03/14/18	25,697	25,697	24,803
CREDIT SUISSE 5.3% 08-13-19	50,440	50,440	56,127
FNMA 2.75% 02-05-14	74,815	74,815	75,180
FEDERAL HOME LN MTG 2.500% 04-23-14	49,631	49,631	50,370
GENERAL ELECTRIC 5.0% 02-01-13	25,700	0	0
GEORGIA PWR CO 5.7% 06/01/17	49,890	49,890	56,359
HEWLETT PACKARD CO 2.125% 09-13-15	50,375	50,375	50,914
JP MORGAN CHASE & CO 3.15% 07-05-16	74,405	74,405	78,629
MCDONALDS 2.625% 01/15/22	25,774	25,774	23,825
MERCK & CO INC 6.4% 03-01-28	22,762	22,762	30,239
UNITED TECHNOLOGIES 5.375% 12-15-17	49,461	49,461	56,978
WELLS FARGO 3.676% 06/15/16	26,498	26,498	26,619
TOTAL CORPORATE LINE 10c	\$705,097	\$679,397	\$717,931
FHLMC #250608 6.5% 7-01-26	355	283	328
FNMA #433230 6.0% 07-01-28	417	105	119
FHLMC #C00647 6.50% 09-01-28	774	542	597
FHLMC GOLD POOL #C21764 6% 02-01-28	1,422	292	326
FNMA #909695 5.4% 03/02/12	19,285	8,918	9,861
TOTAL MORTGAGE LOANS LINE 12	\$22,253	\$10,140	\$11,230

EVERETT FOUNDATION FOR AGED PERSONS INC
STOCKS
FOR THE YEAR ENDED 12-31-13
FORM 990-PF PART II LINE 10b AND 13

STOCK	BOOK VALUE 01/01/2013	BOOK VALUE 12/31/2013	MKT VALUE 12/31/2013
ABBOTT LABS	5,149	2,470	3,833
ABBVIE INC	0	2,679	5,281
ACCENTURE PLC	0	7,403	8,222
ACE LTD	0	8,477	10,353
ADT CORP	3,548	0	0
AIR PRODS & CHEMS INC	4,564	4,564	5,589
ALLERGAN INC	7,938	6,350	11,108
AMAZON COM INC	4,733	4,733	15,952
AMERICAN EXPRESS CO	0	13,072	15,878
AMERICAN WTR WKS INC	6,015	6,015	8,452
ANADARKO PETE CORP	11,041	11,041	11,105
APPLE INC	16,895	16,895	39,271
AT&T INC	6,424	6,424	7,032
BAXTER INTL INC	4,834	4,834	6,955
BB & T CORP	0	7,543	8,397
BECTON DICKINSON	5,799	5,799	8,287
CHEVRON CORP	10,007	12,916	15,614
CIGNA CORP	5,056	5,056	8,748
CITIGROUP INC	9,535	9,535	13,028
COCA COLA CO	6,993	6,993	12,393
COSTCO WHSL CORP	11,234	11,234	17,853
DISNEY WALT CO	9,438	9,438	22,920
DOW CHEM CO	9,608	11,155	15,540
EMC CORP	10,915	13,787	17,605
EMERSON ELEC CO	5,398	5,398	8,773
EXXON MOBIL CORP	7,094	9,237	12,650
FAIRCHILD SEMICONDUCTOR INTL	4,809	4,809	4,005
GENERAL DYNAMICS CORP	7,281	7,281	9,555
GILEAD SCIENCES INC	6,254	6,254	22,530
GOLDMAN SACHS GROUP INC	14,006	14,006	17,726
GOOGLE INC	14,225	14,225	26,897
HOME DEPOT INC	0	15,127	16,468
HONEYWELL INTL INC	10,759	10,759	15,990
IBM	4,085	4,085	18,757
INTERCONTINENTAL EXCHANGE IN	5,677	0	0
JOHNSON & JOHNSON	14,155	14,155	18,318
JP MORGAN CHASE & CO	14,948	14,948	23,392
LOWES COS INC	7,047	0	0
MCDONALD'S CORP	0	9,533	9,703
MCKESSON CORP	6,015	6,015	20,175
MICROSOFT CORP	16,162	16,162	20,576
NATIONAL OILWELL VARCO INC	7,784	9,757	9,941
NESTLE S A	5,457	5,457	7,342
NORDSTROM INC	4,981	0	0
OCCIDENTAL PETE CORP	8,242	10,281	14,265
PARKER HANNIFIN CORP	7,788	7,788	16,080
PEPSICO INC	11,119	11,119	20,735
PNC FINL SVCS GROUP INC	7,991	14,106	19,395
POTASH CORP SASK INC	2,720	0	0
PRICE T ROWE GROUP INC	12,911	12,911	18,848
PROCTER & GAMBLE CO	19,144	19,144	24,423
QUALCOMM INC	11,739	11,739	14,850
QUESTAR CORP	5,419	5,419	8,047
RIO TINTO PLC	6,626	6,626	7,054
ROYAL DUTCH SHELL PLC	12,684	12,684	12,472
SCHLUMBERGER LTD	9,370	13,173	15,769
SEMPRA ENERGY	8,237	8,237	13,464
TJX COS	10,667	10,667	31,865
TARGET CORP	16,592	11,061	12,654
TE CONNECTIVITY LTD	5,600	5,600	11,022
THERMO FISHER SCIENTIFIC CORP	7,596	7,596	16,703
TYCO INTL LTD	5,449	5,449	11,286
UNITED TECHNOLOGIES CORP	3,485	3,485	28,450
VERIZON COMMUNICATIONS INC	6,440	6,440	8,600
VF CORP	7,527	7,527	12,468
WAL MART STORES INC	5,202	5,202	7,869
WELLS FARGO & CO	10,597	10,597	18,160
CORPORATE STOCK LINE 10b	\$509,004	\$562,469	\$896,690
AMERICAN TOWER CORP	4,587	4,587	7,982
ARTISAN INTERNATIONAL FUND	25,000	25,000	40,211
COLUMBIA DIVIDEND INCOME FUN	45,000	40,543	57,922
ISHARES TR MSCI EAFE INDEX FD	37,600	37,600	53,676
ISHARES MSCI EMERGING MKTS	7,440	7,440	8,192
ISHARES S&P SMALLCAP 600	34,648	34,648	68,861
LAZARD FUNDS INC	46,500	46,500	46,827
CREDIT SUISSE COMMODITY	30,000	30,000	23,754
MIDCAP SPDR TR	18,932	18,932	46,642
INVESTMENTS - OTHER LINE 13	\$249,707	\$245,249	\$354,068

EVERETT FOUNDATION FOR AGED PERSONS INC
GAIN AND LOSSES
FOR THE YEAR ENDED 12-31-13
FORM 990-PF PART IV

STOCK	PURCHASE		S	SHS	SALES		GAIN/(LOSS)
	DATE	DATE	L		PROCEEDS	COST	
LOWES COS INC	12-27-12	10-17-13	S	200	9,629	7,047	2,582
TOTAL SHORT TERM					\$9,629	\$7,047	\$2,582
ADT CORP	10-03-11	03-04-13	L	137	6,342	3,513	2,829
ALLERGAN INC	08-18-10	03-04-13	L	25	2,676	1,588	1,089
COLUMBIA DIVIDEND INCOME FUND	11-29-11	10-15-13	L	347.423	6,000	4,457	1,543
INTERCONTINENTAL EXCHANGE INC	11-09-10	03-04-13	L	50	7,630	5,677	1,953
NORDSTROM INC	11-30-09	03-04-13	L	125	6,562	4,981	1,581
POTASH CORP SASK INC	03-15-11	08-05-13	L	50	1,516	2,720	(1,205)
TARGET CORP	11-03-05	03-04-13	L	100	6,228	5,531	698
FHLMC #C00647 6.50% 09-01-28	09-14-98	01-15-13	L	20.34	20	21	(0)
FHLMC GOLD POOL #C21764 6% 02-10-11-99	02-11-99	01-15-13	L	4.21	4	4	0
FHLMC #250608 6.5% 7-01-26	09-12-96	01-25-13	L	2.51	3	2	0
FNMA #433230 6.0% 07-01-28	07-14-98	01-25-13	L	1.57	2	2	0
FNMA #909695 5.4% 03/02/12	03-29-07	01-25-13	L	1,444.96	1,445	1,434	11
GENERAL ELECTRIC 5.0% 02-01-13	11-24-04	02-01-13	L	25,000	25,000	25,700	(700)
FHLMC #C00647 6.50% 09-01-28	09-14-98	02-15-13	L	20.12	20	20	(0)
FHLMC GOLD POOL #C21764 6% 02-10-11-99	02-11-99	02-15-13	L	4.23	4	4	0
FHLMC #250608 6.5% 7-01-26	09-12-96	02-25-13	L	2.49	2	2	0
FNMA #433230 6.0% 07-01-28	07-14-98	02-25-13	L	1.57	2	2	0
FNMA #909695 5.4% 03/02/12	03-29-07	02-25-13	L	752.96	753	747	6
FHLMC #C00647 6.50% 09-01-28	09-14-98	03-15-13	L	18.35	18	19	(0)
FHLMC GOLD POOL #C21764 6% 02-10-11-99	02-11-99	03-15-13	L	4.57	5	5	0
FHLMC #250608 6.5% 7-01-26	09-12-96	03-25-13	L	2.83	3	3	0
FNMA #433230 6.0% 07-01-28	07-14-98	03-25-13	L	1.58	2	2	0
FNMA #909695 5.4% 03/02/12	03-29-07	03-25-13	L	1,057.08	1,057	1,049	8
FHLMC #C00647 6.50% 09-01-28	09-14-98	04-15-13	L	27.52	28	28	(0)
FHLMC GOLD POOL #C21764 6% 02-10-11-99	02-11-99	04-15-13	L	4.60	5	5	0
FHLMC #250608 6.5% 7-01-26	09-12-96	04-25-13	L	41.82	42	40	2
FNMA #433230 6.0% 07-01-28	07-14-98	04-25-13	L	77.61	78	76	2
FNMA #909695 5.4% 03/02/12	03-29-07	04-25-13	L	918.30	918	912	7
FHLMC #C00647 6.50% 09-01-28	09-14-98	05-15-13	L	16.23	16	16	(0)
FHLMC GOLD POOL #C21764 6% 02-10-11-99	02-11-99	05-15-13	L	4.62	5	5	0
FHLMC #250608 6.5% 7-01-26	09-12-96	05-28-13	L	4.80	5	5	0
FNMA #433230 6.0% 07-01-28	07-14-98	05-28-13	L	1.36	1	1	0
FNMA #909695 5.4% 03/02/12	03-29-07	05-28-13	L	394.30	394	391	3
FHLMC #C00647 6.50% 09-01-28	09-14-98	06-17-13	L	23.74	24	24	(0)
FHLMC GOLD POOL #C21764 6% 02-10-11-99	02-11-99	06-17-13	L	514.52	515	509	6
FHLMC #250608 6.5% 7-01-26	09-12-96	06-25-13	L	2.86	3	3	0
FNMA #433230 6.0% 07-01-28	07-14-98	06-25-13	L	178.60	179	175	4
FNMA #909695 5.4% 03/02/12	03-29-07	06-25-13	L	595.68	596	591	4
FHLMC #C00647 6.50% 09-01-28	09-14-98	07-15-13	L	17.74	18	18	(0)
FHLMC GOLD POOL #C21764 6% 02-10-11-99	02-11-99	07-15-13	L	3.12	3	3	0
FHLMC #250608 6.5% 7-01-26	09-12-96	07-25-13	L	3.98	4	4	0
FNMA #433230 6.0% 07-01-28	07-14-98	07-25-13	L	0.81	1	1	0
FNMA #909695 5.4% 03/02/12	03-29-07	07-25-13	L	1,662.74	1,663	1,651	12
FHLMC #C00647 6.50% 09-01-28	09-14-98	08-15-13	L	16.03	16	16	(0)
FHLMC GOLD POOL #C21764 6% 02-10-11-99	02-11-99	08-15-13	L	402.58	403	398	5
FHLMC #250608 6.5% 7-01-26	09-12-96	08-26-13	L	4.71	5	5	0
FNMA #433230 6.0% 07-01-28	07-14-98	08-26-13	L	54.47	54	53	1
FNMA #909695 5.4% 03/02/12	03-29-07	08-26-13	L	1,273.47	1,273	1,264	9
FHLMC #C00647 6.50% 09-01-28	09-14-98	09-16-13	L	15.80	16	16	(0)
FHLMC GOLD POOL #C21764 6% 02-10-11-99	02-11-99	09-16-13	L	1.93	2	2	0
FHLMC #250608 6.5% 7-01-26	09-12-96	09-25-13	L	2.48	2	2	0
FNMA #433230 6.0% 07-01-28	07-14-98	09-25-13	L	0.36	0	0	0
FNMA #909695 5.4% 03/02/12	03-29-07	09-25-13	L	980.56	981	973	7
US TREASURY 3.125% 09-30-13	11-06-08	09-30-13	L	50,000	50,000	51,588	(1,588)
FHLMC #C00647 6.50% 09-01-28	09-14-98	10-15-13	L	20.16	20	20	(0)
FHLMC GOLD POOL #C21764 6% 02-10-11-99	02-11-99	10-15-13	L	1.63	2	2	0
FHLMC #250608 6.5% 7-01-26	09-12-96	10-25-13	L	2.27	2	2	0
FNMA #433230 6.0% 07-01-28	07-14-98	10-25-13	L	0.36	0	0	0
FNMA #909695 5.4% 03/02/12	03-29-07	10-25-13	L	570.20	570	566	4
FHLMC #C00647 6.50% 09-01-28	09-14-98	11-15-13	L	20.31	20	21	(0)
FHLMC GOLD POOL #C21764 6% 02-10-11-99	02-11-99	11-15-13	L	1.64	2	2	0

FHLMC #250608 6.5% 7-01-26	09-12-96	11-25-13	L	2.28	2	2	0
FNMA #433230 6.0% 07-01-28	07-14-98	11-25-13	L	0.36	0	0	0
FNMA #909695 5.4% 03/02/12	03-29-07	11-25-13	L	639.93	640	635	5
FHLMC #C00647 6.50% 09-01-28	09-14-98	12-16-13	L	12.31	12	12	(0)
FHLMC GOLD POOL #C21764 6% 02-11-99	02-11-99	12-16-13	L	195.75	196	194	2
FHLMC #250608 6.5% 7-01-26	09-12-96	12-26-13	L	1.97	2	2	0
FNMA #433230 6.0% 07-01-28	07-14-98	12-26-13	L	0.36	0	0	0
FNMA #909695 5.4% 03/02/12	03-29-07	12-26-13	L	153.84	154	153	1
TOTAL LONG TERM					<u>\$124,164</u>	<u>\$117,868</u>	<u>\$6,296</u>

Application for Extension of Time To File an Exempt Organization Return

► File a separate application for each return.
► Information about Form 8868 and its instructions is at www.irs.gov/form8868.

OMB No. 1545-1709

- 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	Name of exempt organization or other filer, see instructions.	Enter filer's identifying number
	EVERETT FOUNDATION FOR AGED PERSONS INC	Employer identification number (EIN) or 04-2062107
File by the due date for filing your return. See instructions.	Number, street, and room or suite no. If a P.O. box, see instructions. C/O ROBERT BOYNTON 581 BOYLSTON ST, NO. 702	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. BOSTON, MA 02116-3608	

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

04

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 (other than individual)	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

NANCY GIARDINO, TREASURER

- The books are in the care of ► **57 BLAINE ST - MALDEN, MA 02147**
Telephone No. ► **617 536-4868** Fax No. ►
- 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 **AUGUST 15, 2014**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
► ☒ calendar year **2013** or
► ☐ tax year beginning , and ending

- 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 Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	939.
b If this application is for Forms 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	\$	1,440.
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	\$	0.

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