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Form

990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013, or tax year beginning 01-01-2013 , and ending 12-31-2013

Name of foundation ISLAND FOUNDATION INC		A Employer identification number 04-2670567	
Number and street (or P O box number if mail is not delivered to street address) 589 MILL STREET		B Telephone number (see instructions) (508) 748-2809	
City or town, state or province, country, and ZIP or foreign postal code MARION, MA 02738		C If exemption application is pending, check here ▶ ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 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 foundation		E 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 (from Part II, col. (c), line 16)▶\$ 61,714,943		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (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) (see instructions))		(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 (attach schedule)				
	2 Check ▶ ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	135	135		
	4 Dividends and interest from securities.	1,592,738	1,592,738		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	3,234,119			
	b Gross sales price for all assets on line 6a 10,660,394				
	7 Capital gain net income (from Part IV, line 2) . . .		3,234,119		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	4,826,992	4,826,992	0	
	13 Compensation of officers, directors, trustees, etc	100,000	10,000	0	0
	14 Other employee salaries and wages	61,965	6,197	0	0
	15 Pension plans, employee benefits	92,707	9,271	0	0
	16a Legal fees (attach schedule)	2,133	213	0	0
	b Accounting fees (attach schedule)	13,460	1,346	0	0
	c Other professional fees (attach schedule)	32,257	30,226	0	0
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	107,867	1,265	0	0
	19 Depreciation (attach schedule) and depletion . . .	8,171	0	8,171	
	20 Occupancy	21,923	2,192	0	0
	21 Travel, conferences, and meetings	11,391	1,139	0	0
	22 Printing and publications				
	23 Other expenses (attach schedule)	41,681	4,169	0	0
	24 Total operating and administrative expenses. Add lines 13 through 23	493,555	66,018	8,171	0
	25 Contributions, gifts, grants paid	2,691,006			2,709,006
	26 Total expenses and disbursements. Add lines 24 and 25	3,184,561	66,018	8,171	2,709,006
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	1,642,431			
	b Net investment income (if negative, enter -0-)		4,760,974		
	c Adjusted net income (if negative, enter -0-) . . .			0	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	2,058,767	268,466	268,466
	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 (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	4,243		
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	53,464,951	61,290,982	61,290,982
	14	Land, buildings, and equipment basis ▶ _____ 310,085 Less accumulated depreciation (attach schedule) ▶ _____ 154,590	155,866	155,495	155,495
	15	Other assets (describe ▶ _____)			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	55,683,827	61,714,943	61,714,943
Liabilities	17	Accounts payable and accrued expenses	18,839	24,295	
	18	Grants payable	134,000	152,000	
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)	58,589	228,199	
	23	Total liabilities (add lines 17 through 22)	211,428	404,494	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted	55,472,399	61,310,449	
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions)	55,472,399	61,310,449	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	55,683,827	61,714,943	

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	55,472,399
2	Enter amount from Part I, line 27a	2	1,642,431
3	Other increases not included in line 2 (itemize) ▶ _____	3	4,195,619
4	Add lines 1, 2, and 3	4	61,310,449
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	61,310,449

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	See Additional Data Table			
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	See Additional Data Table		
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	See Additional Data Table		
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	3,234,119
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) (see instructions) If (loss), enter -0- in Part I, line 8	}	3	999,614

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 page 18 of 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	2,673,000	51,682,224	0 051720
2011	2,081,371	38,616,714	0 053898
2010	1,904,201	36,222,741	0 052569
2009	1,878,492	31,930,265	0 058831
2008	2,330,307	38,246,283	0 060929

2	Total of line 1, column (d).	2	0 277947
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	0 055589
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	57,319,463
5	Multiply line 4 by line 3.	5	3,186,332
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	47,610
7	Add lines 5 and 6.	7	3,233,942
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	2,709,006

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)			
1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1		1	95,219
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 ☐ and enter 1% of Part I, line 27b			
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	95,219
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	95,219
6 Credits/Payments			
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	41,360
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	41,360
8 Enter any penalty for underpayment of estimated tax Check here ☐ 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	53,859
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	
11 Enter the amount of line 10 to be Credited to 2014 estimated tax Refunded		11	

Part VII-A Statements Regarding Activities			
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?		1b	No
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.			
c Did the foundation file Form 1120-POL for this year?.		1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ 0 (2) On foundation managers \$ 0			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS?		2	No
If "Yes," attach a detailed description of the activities.			
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?.		4a	No
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?		5	No
If "Yes," attach the statement required by General Instruction T.			
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	Yes
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	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) 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	Yes
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	No
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.		10	No

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		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address N/A				
14	The books are in care of OLIVER MOORE TREASURER Telephone no (508) 748-2809 Located at 589 MILL STREET MARION MA ZIP+4 02738			
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		
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 instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			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? ☐ Yes ☒ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. ☐ Yes ☒ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?. ☐ Yes ☒ No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ 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 page 20 of the instructions)?. Organizations relying on a current notice regarding disaster assistance check here.	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 2013?.	1c		No
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?. If "Yes," list the years 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. ☐ Yes ☒ 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.</i>)	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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		No

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))?

YesNo

(2)

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

YesNo

(3)

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

YesNo

(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)? (see instructions).

YesNo

(5)

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

YesNo

5b

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

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

c

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

YesNo

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?

YesNo

6b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

No

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

YesNo

7b

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

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 (see instructions).

(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 Additional Data Table				

2

Compensation of five highest-paid employees (other than those included on line 1—see instructions). 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 (see instructions). 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 THE FOUNDATION'S PRIORITIES FALL WITHIN THREE MAJOR CATEGORIES - ENVIRONMENT, COMMUNITY DEVELOPMENT IN NEW BEDFORD AND ALTERNATIVE EDUCATION	0
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions	
3	
Total. Add lines 1 through 3.	0

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	58,183,573
b	Average of monthly cash balances.	1b	8,775
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	58,192,348
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	58,192,348
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	872,885
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	57,319,463
6	Minimum investment return. Enter 5% of line 5.	6	2,865,973

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	2,865,973
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	95,219
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	95,219
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	2,770,754
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	2,770,754
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	2,770,754

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	2,709,006
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	2,709,006
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 (see instructions).	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	2,709,006
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				2,770,754
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2013				
a From 2008.				
b From 2009.				
c From 2010.				
d From 2011.				
e From 2012.				130,238
f Total of lines 3a through e.	130,238			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 2,709,006				
a Applied to 2012, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2013 distributable amount.				2,709,006
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).)	61,748			61,748
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	68,490			
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 instructions			0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).	0			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . . .	0			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	68,490			
10 Analysis of line 9				
a Excess from 2009. . . .				
b Excess from 2010. . . .				
c Excess from 2011. . . .				
d Excess from 2012. . . .				68,490
e Excess from 2013. . . .				

Part XIV

Private Operating Foundations (see instructions and Part VII-A, question 9)

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling.

b

Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
		(a) 2013	(b) 2012	(c) 2011	(d) 2010	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed					
d	Amounts included in line 2c not used directly for active conduct of exempt activities					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . .					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part XV

Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)

1

Information Regarding Foundation Managers:

a

List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

b

List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2

Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a

The name, address, and telephone number or e-mail address of the person to whom applications should be addressed

DENISE PORCHE
589 MILL STREET
MARION,MA 02738
(508) 748-2809

b

The form in which applications should be submitted and information and materials they should include

APPLYING IS A TWO-STEP PROCESS - A LETTER OF INQUIRY OR PHONE CALL AND SENDING THE FOUNDATION A FULL PROPOSAL. INCLUDE WITH LETTER OF INQUIRY A DESCRIPTION OF THE PROJECT, OR CALL THE FOUNDATION TO DISCUSS THE PROJECT IDEA. INCLUDE WITH THE PROPOSAL A COVER LETTER THAT SPECIFIES THE AMOUNT OF FUNDING SOUGHT, SUMMARY OF THE PROPOSAL IDEA, PRODUCTS AND TIMEFRAME. THREE TO FIVE PAGES WHICH BRIEFLY DESCRIBE THE HISTORY OF THE ORGANIZATION, PROJECT GOALS, METHODS FOR REACHING GOALS, NEED FOR THE PROJECT, QUALIFICATIONS OF THE ORGANIZATION AND STAFF AND MEASURES OF SUCCESS. ATTACH A PROJECT BUDGET AND PAST AND CURRENT YEAR BUDGETS FOR THE OVERALL ORGANIZATION, RECENT FINANCIAL STATEMENT OR AUDIT, LIST OF BOARD OF DIRECTORS AND STAFF, IRS DETERMINATION LETTER INDICATING EXEMPT STATUS, ALSO IF USING A FISCAL AGENT PLEASE INCLUDE A LETTER FROM THIS ORGANIZATION AND SUPPLEMENTARY MATERIALS SUCH AS ANNUAL REPORTS, NEWSLETTERS, MEDIA COVERAGE AND OR BROCHURES.

c

Any submission deadlines

DUE MARCH 1ST, JUNE 1ST, SEPTEMBER 1ST, DECEMBER 1ST FOR FUNDS TO BE DISTRIBUTED THE FOLLOWING MONTH

d

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

THE FOUNDATION DOES NOT SUPPORT REQUESTS FROM INDIVIDUALS, RELIGIOUS ORGANIZATIONS OR FOR PROFIT ORGANIZATIONS

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 <i>Paid during the year</i> See Additional Data Table				
Total			3a	2,691,006
b <i>Approved for future payment</i>				
Total			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
CHARLES SCHWAB 46486556 SHORT TERM	P		
CHARLES SCHWAB 46486556 LONG TERM	P		
CHARLES SCHWAB 788123090 SHORT TERM	P		
CHARLES SCHWAB 78812090 LONG TERM	P		
CAPITAL GAIN DISTRIBUTIONS	P		
CAPITAL GAIN DISTRIBUTIONS	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
1,572,593		1,293,188	279,405
5,977,855		4,665,467	1,312,388
1,294,794		1,221,970	72,824
1,815,152		1,540,420	274,732
			647,385
			647,385

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) 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	
			279,405
			1,312,388
			72,824
			274,732
			647,385
			647,385

Form 990PF Part VIII Line 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
HANNAH MOORE	PRESIDENT 5 00	0	0	0
589 MILL STREET MARION,MA 02738				
PETER NESBEDA	DIRECTOR 5 00	0	0	0
589 MILL STREET MARION,MA 02738				
DOUGLAS WATSON	DIRECTOR 5 00	0	0	0
589 MILL STREET MARION,MA 02738				
DENISE PORCHE	ASSISTANT CLERK 40 00	100,000	24,295	0
589 MILL STREET MARION,MA 02738				
MICHAEL PUZO	CLERK 5 00	0	0	0
589 MILL STREET MARION,MA 02738				
KATHARINE CLARK	DIRECTOR 5 00	0	0	0
589 MILL STREET MARION,MA 02738				
KIM CLARK	VICE PRESIDENT 5 00	0	0	0
589 MILL STREET MARION,MA 02738				
STEPHEN CLARK	DIRECTOR 5 00	0	0	0
589 MILL STREET MARION,MA 02738				
WILLIAM CLARK	DIRECTOR 5 00	0	0	0
589 MILL STREET MARION,MA 02738				
DAVID CLARK	DIRECTOR 5 00	0	0	0
589 MILL STREET MARION,MA 02738				
CHRISTOPHER MOORE	DIRECTOR 5 00	0	0	0
589 MILL STREET MARION,MA 02738				
MICHAEL MOORE	DIRECTOR 5 00	0	0	0
589 MILL STREET MARION,MA 02738				
OLIVER MOORE	TREASURER 5 00	0	0	0
589 MILL STREET MARION,MA 02738				
SAMUEL MOORE	DIRECTOR 5 00	0	0	0
589 MILL STREET MARION,MA 02738				
WILLIAM MOORE	DIRECTOR 5 00	0	0	0
589 MILL STREET MARION,MA 02738				
HANNAH NESBEDA	DIRECTOR 5 00	0	0	0
589 MILL STREET MARION,MA 02738				
JOANN WATSON	DIRECTOR 5 00	0	0	0
589 MILL STREET MARION,MA 02738				
CHRISTOPHER TUPPER	DIRECTOR 5 00	0	0	0
589 MILL STREET MARION,MA 02738				
EMILY RICE	DIRECTOR 5 00	0	0	0
589 MILL STREET MARION,MA 02738				
HELEN TUPPER	DIRECTOR 5 00	0	0	0
589 MILL STREET MARION,MA 02738				

Form 990PF Part XV Line 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				
3RD EYE YOUTH EMPOWERMENT INC 28 UNION STREET NEW BEDFORD,MA 02740		NON-PROFIT	GENERAL SUPPORT	10,000
ALEXANDRIA SEAPORT FOUNDATION PO BOX 25036 ALEXANDRIA,VA 22313		NON-PROFIT	GENERAL SUPPORT	4,334
ALMA DEL MAR CHARTER SCHOOL 26 MADEIRA AVENUE NEW BEDFORD,MA 02746		NON-PROFIT	TEACHER LEADERSHIP DEVELOPMENT	15,000
AMMONOOSUC CONSERVATION TRUST 107 GLESSNER ROAD BETHLEHEM,NH 03574		NON-PROFIT	GENERAL SUPPORT	5,000
ARTWORKS PARTNERS FOR THE ARTS & COMMUNITY INC 384 ACUSHNET AVENUE NEW BEDFORD,MA 02740		NON-PROFIT	GENERAL PURPOSE	25,000
ASSOCIATED SCIENTISTS AT WOODS HOLE PO BOX 721 WOODS HOLE,MA 02453		NON-PROFIT	RIGHT WHALE NEWS, COST-SHARE SUPPORT FOR 2012 PUBLICATION	2,000
AUDOBON NEBRASKAROWE SANCTUARY 44450 ELM ISLAND ROAD GIBBON,NE 68840		NON-PROFIT	GENERAL SUPPORT	21,667
AVIAN HAVEN 418 NORTH PALERMO ROAD FREEDOM,ME 04941		NON-PROFIT	GENERAL SUPPORT	2,000
BIGELOW LABORATORY FOR OCEAN SCIENCES 60 BIGELOW DRIVE EAST BOOTHBAY,ME 04544		NON-PROFIT	GENERAL SUPPORT	5,000
BOSTON HEALTH CARE FOR THE HOMELESS PROGRAM 780 ALBANY STREET BOSTON,MA 02118		NON-PROFIT	GENERAL SUPPORT	10,000
BOYS & GIRLS CLUB OF GREATER NEW BEDFORD 166 JENNEY STREET NEW BEDFORD,MA 02740		NON-PROFIT	GENERAL SUPPORT	20,000
BOYS & GIRLS CLUB OF GREATER NEW BEDFORD 166 JENNEY STREET NEW BEDFORD,MA 02740		NON-PROFIT	WAREHAM MLK DAY	500
BOYS & GIRLS CLUB OF GREATER NEW BEDFORD 166 JENNEY STREET NEW BEDFORD,MA 02740		NON-PROFIT	WAREHAM MLK DAY	500
BRIDGEWATER STATE UNIVERSITY 131 SUMMER STREET BRIDGEWATER,MA 02325		NON-PROFIT	BRIDGE PARTNERSHIP ACADEMIC YEAR EXPANSION	25,000
BUZZARDS BAY COALITION 34 BARSTOW STREET MATTAPOISETT,MA 02739		NON-PROFIT	NITROGEN POLLUTION REDUCTION EFFORTS	25,000
Total  3a				2,691,006

Form 990PF Part XV Line 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				
BUZZARDS BAY MUSICFEST PO BOX 865 MARION,MA 02738		NON-PROFIT	GENERAL SUPPORT/ PENZANCE FUND	5,000
CATHOLIC SOCIAL SERVICES PO BOX 1210 NEW BEDFORD,MA 02740		NON-PROFIT	SISTER ROSE HOUSE	40,000
CHAPLAINCY INSTITUTE OF MAINE PO BOX 3833 PORTLAND,ME 04104		NON-PROFIT	IN HONOR OF JACOB WATSON	10,834
CHILD & FAMILY SERVICES 1061 PLEASANT STREET NEW BEDFORD,MA 02740		NON-PROFIT	BIG BROTHERS BIG SISTERS OF CHILD & FAMILY SERVICES	10,000
CITIZENS' HOUSING AND PLANNING ASSOCIATION 18 TREMONT STREET BOSTON,MA 02108		NON-PROFIT	MA SMART GROWTH ALLIANCE/ GREAT NEIGHBORHOODS NEW BEDFORD	13,000
CLIMATE CENTRAL ONE PALMER SQUARE PRINCETON,NJ 08542		NON-PROFIT	PHYSICAL AND SOCIAL VULNERABILITY TO SEA LEVEL RISE - ANALYSIS AND TOOLS	35,000
COALITION AGAINST POVERTY 105 WILLIAM STREET NEW BEDFORD,MA 02740		NON-PROFIT	NEW BEDFORD GRASSROOTS ANTI-POVERTY ORGANIOZING PROJECT	10,000
COMMUNITY BOATING CENTER 1641 PANDANARAM AVENUE NEW BEDFORD,MA 02740	OLIVER MOORE TREASURER	NON-PROFIT	GENERAL SUPPORT	15,000
COMMUNITY BOATING CENTER 1641 PANDANARAM AVENUE NEW BEDFORD,MA 02740	OLIVER MOORE TREASURER	NON-PROFIT	GENERAL SUPPORT	21,667
COMMUNITY ECONOMIC DEVELOPMENT CENTER OF SOUTHEASTERN MA 1285 ACUSHNET AVENUE NEW BEDFORD,MA 02746	JO-ANN WATSON TRUSTEE	NON-PROFIT	FISHING FAMILY TAX ASSISTANCE PROGRAM/SAILORS' SNUG HARBOR	5,000
COMMUNITY ECONOMIC DEVELOPMENT CENTER OF SOUTHEASTERN MA 1285 ACUSHNET AVENUE NEW BEDFORD,MA 02746		NON-PROFIT	GENERAL SUPPORT	25,000
COMMUNITY ECONOMIC DEVELOPMENT CENTER OF SOUTHEASTERN MA 1285 ACUSHNET AVENUE NEW BEDFORD,MA 02746		NON-PROFIT	WORKING WATERFRONT FESTIVAL	15,000
COMMUNITY FOUNDATION OF SOUTHEASTERN MA 63 UNION STREET NEW BEDFORD,MA 02740	KIM CLARK DIRECTOR EMIRITUS	NON-PROFIT	AHA NEW BEDFORD GENERAL SUPPORT	20,000
COMMUNITY FOUNDATION OF SOUTHEASTERN MA 63 UNION STREET NEW BEDFORD,MA 02740	KIM CLARK DIRECTOR EMIRITUS	NON-PROFIT	SOUTHEASTERN MA FOOD	12,000
COMMUNITY FOUNDATION OF SOUTHEASTERN MA 63 UNION STREET NEW BEDFORD,MA 02740	KIM CLARK DIRECTOR EMIRITUS	NON-PROFIT	WISE WOMAN PROGRAM	25,000
Total  3a				2,691,006

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
COMMUNITY FOUNDATION OF SOUTHEASTERN MA 63 UNION STREET NEW BEDFORD,MA 02740	KIM CLARK DIRECTOR EMIRITUS	NON-PROFIT	PROFESSIONAL TRAINING DAY ON LEADERSHIP	5,000
COMMUNITY FOUNDATION OF SOUTHEASTERN MA 63 UNION STREET NEW BEDFORD,MA 02740	KIM CLARK DIRECTOR EMIRITUS	NON-PROFIT	SEEAL/SOUTHCOAST ENERGY CHALLENGE	20,000
COMMUNITY RESOURCES NETWORK PO BOX 550 WAREHAM,MA 02571		NON-PROFIT	GENERAL SUPPORT	1,000
CONSERVATION LAW FOUNDATION 62 SUMMER STREET BOSTON,MA 02110		NON-PROFIT	N ATLANTIC RIGHT WHALE PROTECTION	25,000
COOL EARTH 2 PARK STREET LONDON UK		FOREIGN PUBLIC CHARI	GENERAL SUPPORT	7,222
CROSSROADS RI HOMELESS SHELTER AND SERVICES 160 BROAD STREET PROVIDENCE,RI 02903		NON-PROFIT	GENERAL SUPPORT	14,333
DENNISON MEMORIAL COMMUNITY CENTER 755 SOUTH FIRST STREET NEW BEDFORD,MA 02744		NON-PROFIT	TEEN NIGHTS PROGRAM/GENERAL SUPPORT	25,000
DREAM OUT LOUD CENTER INC 13 NORTH SIXTH STREET NEW BEDFORD,MA 02740		NON-PROFIT	CREATIVE CAREERS PROGRAM	10,000
EAST BAY COMMUNITY ACTION PROGRAMCOALITION FOR THE HOMELESS 100 BUTTOCK POINT AVENUE EAST PROVIDENCE,RI 02915		NON-PROFIT	GENERAL SUPPORT	1,000
ECORI NEWS 111 HOPE STREET PROVIDENCE,RI 02906		NON-PROFIT	ECORI NEWS WRITING PROJECT	2,500
EPISCOPAL DIOCESE OF NHST FRANCIS' CHAPEL 63 GREEN STREET CONCORD,NH 03301		NON-PROFIT	ST FRANCIS' CHAPEL	5,000
FALMOUTH ACADEMY 7 HIGHFIELD DRIVE FALMOUTH,MA 02540		NON-PROFIT	GENERAL SUPPORT	33,334
FEDERATED CHURCH OF MARLBOROUGH 16 PLEASANT STREET MARLBOROUGH,MA 03455		NON-PROFIT	FOR THE COMMUNITY HOUSE	6,667
FOSTER PARROTS PO BOX 650 ROCKLAND,MA 02370		NON-PROFIT	GENERAL SUPPORT	4,334
FRIENDS OF SOUTH GEORGIA ISLAND 25 DAKOTA MEADOWS CARBONDALE,CO 81623	MICHAEL MOORE DIRECTOR	NON-PROFIT	GENERAL SUPPORT	43,334
Total  3a				2,691,006

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
FRIENDS OF SOUTH GEORGIA ISLAND 25 DAKOTA MEADOWS CARBONDALE,CO 81623	MICHAEL MOORE DIRECTOR	NON-PROFIT	GENERAL SUPPORT	11,667
GALLERY X 169 WILLIAM STREET NEW BEDFORD,MA 02748		NON-PROFIT	GENERAL SUPPORT	12,000
GIFTS OF MUSIC PO BOX 264 ORRINGTON,ME 04474		NON-PROFIT	GENERAL SUPPORT	2,000
GK 1 WORLD FOUNDATION 13860 STOWE DRIVE POWAY,CA 92064		NON-PROFIT	GENERAL SUPPORT	7,222
GLOBAL GREENGRANTS FUND 2840 WILDERNESS PLACE SUITE A BOULDER,CO 80301		NON-PROFIT	GENERAL SUPPORT	15,000
GOOD SHEPARD FOOD BANK PO BOX 1807 AUBURN,ME 04211		NON-PROFIT	GENERAL SUPPORT	10,000
GULF OF MAINE RESEARCH INSTITUTE 350 COMMERCIAL STREET PORTLAND,ME 04101		NON-PROFIT	ECONOMIC ADVICE TO ADVANCE FISHERY MANAGEMENT	25,000
GULF OF MAINE RESEARCH INSTITUTE 350 COMMERCIAL STREET PORTLAND,ME 04101		NON-PROFIT	POWERHOUSE	60,000
HOLBROOK COMMUNITY FOUNDATION 9 GILMAN AVE BRUNSWICK,ME 04011		NON-PROFIT	GENERAL SUPPORT	5,000
HULL LIFESAVING MUSEUM 1117 NANTASKET AVENUE HULL,MA 02045		NON-PROFIT	GENERAL SUPPORT	4,334
IMMIGRANTS' ASSISTANCE CENTER INC 58 CRAPO STREET NEW BEDFORD,MA 02740		NON-PROFIT	GENERAL SUPPORT GRANT FOR IMMIGRANT FAMILIES	20,000
IRISH WHALE AND DOLPHIN GTOUP MERCHANTS QUAY KILRUSH EI		FOREIGN PUBLIC CHARI	CAPE VERDE HUMPBACK WHALE PROJECT	20,000
JONES RIVER WATERSHED ASSOCIATION PO BOX 73 KINGSTON,MA 02364		NON-PROFIT	CAPE COD BAY ADVOCACY	10,000
JR ACHIEVEMENT OF SOUTHERN MA 227 UNION STREET NEW BEDFORD,MA 02740		NON-PROFIT	JR ACHIEVEMENT K-12 PROGRAMS	15,000
KITTY ANGELS PO BOX 638 TYNGSBOROUGH,MA 01879		NON-PROFIT	GENERAL SUPPORT	5,000
Total  3a				2,691,006

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
LAHEY CLINIC GENERAL FUND PHILANTROPY DEPT BURLINGTON,MA 01805		NON-PROFIT	GENERAL SUPPORT	15,834
LAND TRUST ALLIANCE 1660 L ST NW SUITE 1100 WASHINGTON,DC 200365635		NON-PROFIT	SUPPORT FOR RALLY	10,000
LIGHTHAWK 106 RAVINE DRIVE CUMBERLAND,ME 04110		NON-PROFIT	FLYING FOR CONSERVATION IN THE NORTHEAST 2013	15,000
LLOYD CENTER FOR THE ENVIRONMENT 430 POTOMSKA ROAD DARTMOUTH,MA 02748		NON-PROFIT	CLIMAT SCIENCE LEARNING PROJECT	15,000
MA DEPARTMENT OF ARGICULTURAL RESOURCES 251 CAUSEWAY ST SUITE 500 BOSTON,MA 02114		GOVERNMENT	MA FOOD POLICY EXPANDABLE TRUST	5,000
MA DIVISION OF FISHERIES AND WILDLIFE 1 RABBIT HILL WESTBOROUGH,MA 01581		GOVERNMENT	BUZZARDS BAY TERN RESTORATION PROJECT	40,000
MARION INSTITUTE 202 SPRING STREET MARION,MA 02738		NON-PROFIT	CONNECTING FOR CHANGE A BIONEERS BY THE BSY CONFERENCE	10,000
MARION INSTITUTE 202 SPRING STREET MARION,MA 02738		NON-PROFIT	GROW EDUCATION	10,000
MARION INSTITUTE 202 SPRING STREET MARION,MA 02738		NON-PROFIT	I AM SOMEBODY	10,000
MASS AUDOBON 208 SOUTH GREAT ROAD LINCOLN,MA 01773		NON-PROFIT	MASS AUDOBON'S COASTAL WATERBIRD PROGRAM	30,000
MASS AUDOBON 208 SOUTH GREAT ROAD LINCOLN,MA 01773		NON-PROFIT	GENERAL SUPPORT OF COASTAL WATERBIRD PROGRAM	5,000
MASSACHUSETTS ASSOCIATION OF CONSERVATION COMMISSIONS 10 JUNIPER ROAD BELMONT,MA 02478		NON-PROFIT	MACC ANNUAL ENVIRONMENTAL CONFERENCE	5,000
MASSACHUSETTS LAND TRUST COALITION 18 WOLBACH ROAD SUDBURY,MA 01776		NON-PROFIT	GENERAL SUPPORT	10,000
MEMPHIS AREA GOLDEN RETRIEVER RESCUE PO BOX 383122 GERMANTOWN,TN 38183		NON-PROFIT	GENERAL SUPPORT	1,000
MICHAEL J FOX FOUNDATION FOR PARKINSON'S RESEARCH 498 7TH AVE 18TH FLOOR NEW YORK,NY 10018		NON-PROFIT	PARKINSON RESEARCH STUDIES	50,000
Total  3a				2,691,006

Form 990PF Part XV Line 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				
MID-COAST HUNGER PREVENTION PROGRAM 84A UNION STREET BRUNSWICK,ME 04011		NON-PROFIT	THE BACKPACK PROGRAM	7,667
MONADNOCK CONSERVANCY PO BOX 337 KEENE,NH 03431		NON-PROFIT	GENERAL SUPPORT	5,000
NARROWS CENTER FOR THE ARTS 16 ANAWAN STREET FALL RIVER,MA 02721		NON-PROFIT	GENERAL SUPPORT	4,333
NATIVITY PREPARATORY SCHOOL NEW BEDFORD 66 SPRING STREET NEW BEDFORD,MA 02740		NON-PROFIT	GENERAL SUPPORT FOR TECHNOLOGY	25,000
NATURAL RESOURCES COUNCIL OF MAINE 3 WADE STREET AUGUSTA,ME 04330		NON-PROFIT	PROTECTING THE NATURE OF MAINE	30,000
NEW BEDFORD COMMUNITY ROWING 1213 PURCHASE ST 2ND FLOOR NEW BEDFORD,MA 02740		NON-PROFIT	GENERAL SUPPORT	10,000
NEW BEDFORD EDUCATION FOUNDATION PO BOX 6250 NEW BEDFORD,MA 02740	DENISE PORCHE SPECIAL ADVISOR	NON-PROFIT	GENERAL SUPPORT	15,000
NEW BEDFORD HISTORICAL SOCIETY 21 7TH STREET NEW BEDFORD,MA 02740		NON-PROFIT	GENERAL SUPPORT	10,000
NEW BEDFORD KIDS SCHOLARSHIP PROGRAM PO BOX 79198 DARTMOUTH,MA 02747		NON-PROFIT	NB STAR KIDS OPERATING COSTS	10,000
NEW BEDFORD MUSEUM AND ART CENTER INC 68 PLEASANT STREET NEW BEDFORD,MA 02740		NON-PROFIT	NEW BEDFORD HARBOR IN A NEW LIGHT	10,000
NEW BEDFORD OCEANARIUM CORP 174 UNION STREET NEW BEDFORD,MA 02741		NON-PROFIT	STEMMING THE TIDE ENHANCING THE EDUCATIONAL OPPORTUNITIES	15,000
NEW BEDFORD SYMPHONY ORCHESTRA PO BOX 2053 NEW BEDFORD,MA 02741		NON-PROFIT	YOUNG PEOPLE'S CONCERTS	10,000
NEW BEDFORD WHALINGMUSEUM 18 JOHNNY CAKE HILL NEW BEDFORD,MA 02740		NON-PROFIT	EDUCATION PROGRAM FOR NEW BEDFORD YOUTH	20,000
NEW BEDFORD WHALINGMUSEUM 18 JOHNNY CAKE HILL NEW BEDFORD,MA 02740		NON-PROFIT	APPRENTICE PROGRAM	30,000
NEW DIRECTIONS SOUTHCOAST INC 5 DOVER STREET NEW BEDFORD,MA 02740		NON-PROFIT	MAYOR'S LEARN AND SERVE SUMMER YOUTH PROGRAM	5,000
Total  3a				2,691,006

Form 990PF Part XV Line 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				
NEW ENGLAND ACQUARIUM NEW ENGLAND ACQUARIUM BOSTON,MA 02110	MICHAEL MOORE BOARD MEMBER	NON-PROFIT	NORTH ATLANTIC RIGHT WHALE CONSORTIUM	12,995
NEW ENGLAND ACQUARIUM NEW ENGLAND ACQUARIUM BOSTON,MA 02110		NON-PROFIT	RIGHT WHALE RESEARCH MONITORING AND CONSERVATION IN THE BAY OF FUND	50,000
NEW ENGLAND FARMERS UNION EDUCATION FOUNDATION P O BOX 226 SHELBURNE FALLS,MA 01370		NON-PROFIT	BUY LOCAL CARBON	25,000
NORTH & SOUTH RIVER WATERSHED ASSOCIATION PO BOX 43 NORWELL,MA 02061		NON-PROFIT	WATERSHED ACTION ALLIANCE OF SOUTHEASTERN MASSACHUSETTS OUTREACH PROGRAM	10,000
NORTHSTAR LEARNING CENTERS 53 LINDEN STREET NEW BEDFORD,MA 02740		NON-PROFIT	ROOTS CONNECTING THE PAST TO OUR FUTURE	5,000
OUR SISTERS' SCHOOL INC 145 BROWNELL AVE NEW BEDFORD,MA 02740		NON-PROFIT	GENERAL SUPPORT	13,000
PARTNERS IN HEALTH PO BOX 845578 BOSTON,MA 02284		NON-PROFIT	GENERAL SUPPORT	10,000
PAUL CUFFEE SCHOOL 459 PROMENADE STREET PROVIDENCE,RI 02908		NON-PROFIT	HANDS ON ENVIRONMENTAL EDUCATION EXPERIENCES TO ENHANCE MIDDLE SCHOOL	5,000
PENOBSCOT EAST RESOURCE CENTER PO BOX 27 STONINGTON,ME 04681		NON-PROFIT	FISHERMAN'S LEADERSHIP	20,000
PEOPLE ACTING IN COMMUNITY ENDEAVORS (PACE) INC 166 WILLIAM STREET NEW BEDFORD,MA 02740		NON-PROFIT	PACE YOUTHBUILD NEW BEDFORD	20,000
PEOPLE ACTING IN COMMUNITY ENDEAVORS (PACE) INC 166 WILLIAM STREET NEW BEDFORD,MA 02740		NON-PROFIT	THE H O P E COLLABORATIVE	5,000
PEOPLE ACTING IN COMMUNITY ENDEAVORS (PACE) INC 166 WILLIAM STREET NEW BEDFORD,MA 02740		NON-PROFIT	PACE LIFELINE	20,000
PKD FOUNDATION 8330 WARD PARKWAY KANSAS CITY,MO 64114		NON-PROFIT	GENERAL SUPPORT	50,000
PLANNED PARENTHOOD FEDERATION OF AMERICA 434 WEST 33RD STREET NEW YORK,NY 10001		NON-PROFIT	GENERAL SUPPORT / GLOBAL PROGRAMS	25,000
PLANNED PARENTHOOD OF SOUTHERN NEW ENGLAND 345 WHITNEY AVENUE NEW HAVEN,CT 06511		NON-PROFIT	GENERAL SUPPORT	21,667
Total  3a				2,691,006

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
PRESERVE RHODE ISLAND 957 NORTH MAIN STREET PROVIDENCE,RI 02904		NON-PROFIT	GENERAL SUPPORT	1,000
PROVINCETOWN CENTER FOR COASTAL STUDIES 115 BRADFORD STREET PROVINCETON,MA 02653		NON-PROFIT	COMMUNICATING COASTAL CHANGE	25,000
PROVINCETOWN CENTER FOR COASTAL STUDIES 115 BRADFORD STREET PROVINCETON,MA 02653		NON-PROFIT	MONTHLY AERIAL SURVEYS OF SEAL HAUL OUTS	20,000
QUEBEC-LABRADOR FOUNDATION INC 55 SOUTH MAIN STREET IPSWICH,MA 01938	JO-ANN WATSON DIRECTOR	NON-PROFIT	INVESTING IN NEXT GENERATION OF COMMUNITY LEADERS	50,000
RED TOMATO 76 EVERETT SKINNER ROAD PLAINVILLE,MA 02762		NON-PROFIT	SCALING UP NORTHEAST REGIONAL FOOD SYSTEMS	20,000
REGENTS OF THE UNIVERSITY OF CALIFORNIA ONE SHIELDS AVENUE DAVIS,CA 95616		NON-PROFIT	INVESTIGATING ONGOING UNUSUAL MORTALITY OF SOUTHERN RIGHT WHALES	20,000
RHODE ISLAND COMMUNITY FOOD BANK 200 NIAN TIC AVENUE PROVIDENCE,RI 02907		NON-PROFIT	GENERAL SUPPORT	5,667
RI SOCIETY FOR PREVENTION OF CRUELTY TO ANIMALS 186 AMARAL STREET RIVERSIDE,RI 02915		NON-PROFIT	GENERAL SUPPORT	4,333
RI VETERINARY MEDICINE ASSOCIATIONCOMPANION ANIMAL FOUNDATION 11 SOUTH ANGELL STREET PROVIDENCE,RI 02906		NON-PROFIT	GENERAL SUPPORT	1,000
ROSIE'S PLACE 889 HARRISON AVE BOSTON,MA 02118		NON-PROFIT	GENERAL SUPPORT	4,333
RUFF RESIDENTS UNITED FOR FURRY FRIENDS PO BOX 568 WARREN,RI 02855		NON-PROFIT	GENERAL SUPPORT	4,334
RUFF RESIDENTS UNITED FOR FURRY FRIENDS PO BOX 568 WARREN,RI 02885		NON-PROFIT	GENERAL SUPPORT	3,000
SAVE THE BAY INC 100 SAVE THE BAY DRIVE PROVIDENCE,RI 02905	STEVE CLARK DIRECTOR	NON-PROFIT	GENERAL SUPPORT	35,000
SEMAP 63 UNION STREET NEW BEDFORD,MA 02740		NON-PROFIT	SOUTHEASTERN MA AGRICULTURAL PARTNERSHIP	30,000
SEMAP 63 UNION STREET NEW BEDFORD,MA 02740		NON-PROFIT	FACILITATION SUPPORT	5,000
Total  3a				2,691,006

Form 990PF Part XV Line 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				
SIPPICAN LANDS TRUST INC 354 FRONT STREET MARION,MA 02738		NON-PROFIT	GENERAL SUPPORT	5,000
SOUTH COASTAL COUNTIES LEGAL SERVICES INC 22 BEDFORD STREET FALL RIVER,MA 02722		NON-PROFIT	EDUCATION ADVOCACY PROJECT - NEW BEDFORD	20,000
SOUTHEASTERN REGIONAL PLANNING AND ECONOMIC DEVELOPMENT DISTRICT 88 BROADWAY TAUNTON,MA 02780		GOVERNMENT	COASTAL ADAPTATION FOR FLOOD HAZARD ASSESSMENT	10,000
SOUTHEASTERN REGIONAL PLANNING AND ECONOMIC DEVELOPMENT DISTRICT 88 BROADWAY TAUNTON,MA 02780		GOVERNMENT	SUPPORTING REGIONAL COMMUNITY GARDENS AND URBAN ARGICULTURE	12,505
SOUTHSIDE COMMUNITY LAND TRUST 109 SOMERSET STREET PROVIDENCE,RI 02907		NON-PROFIT	GENERAL SUPPORT	25,000
TEACH FOR AMERICA - GREATER COSTON 60 CANAL STREET 5TH FLOOR BOSTOM,MA 02114		NON-PROFIT	EXPANDING EDUCATIONAL OPPORTUNITY	15,000
THE COMPACT OF CAPE COD CONSERVATION TRUSTS INC PO BOX 443 BARNSTABLE,MA 02630		NON-PROFIT	GENERAL SUPPORT 2013	20,000
THE COMPACT OF CAPE COD CONSERVATION TRUSTS INC PO BOX 443 BARNSTABLE,MA 02630		NON-PROFIT	GENERAL SUPPORT	21,667
THE GREATER BOSTON FOOD BANK INC 70 SOUTH BAY AVE BOSTON,MA 02118		NON-PROFIT	GENERAL SUPPORT	1,667
THE GREENE SCHOOL 94 JOHN POTTER ROAD WEST GREENWICH,RI 02817		NON-PROFIT	FINDING OUR PLACE BY THE SEA	10,000
THE LANDING SCHOOL OF BOATBUILDING AND DESIGN 286 RIVER ROAD ARUNDEL,ME 04046	HELEN TUPPER FOUNDER	NON-PROFIT	BERMUDA SCHOLARSHIP PROGRAM	37,000
THE PROVIDENCE ANIMAL RESCUE LEAGUE 34 ELBOW STREET PROVIDENCE,RI 02903		NON-PROFIT	GENERAL SUPPORT	4,333
THE ROBERT POTTER LEAGUE FOR ANIMALS 87 OLIPHANT LANE MIDDLETOWN,RI 02842		NON-PROFIT	GENERAL SUPPORT	4,333
THE TRUSTEES OF RESERVATIONS 572 ESSEX STREET BEVERLY,MA 01915		NON-PROFIT	ALLEN C HASKELL PROPERTY	30,000
THE TRUSTEES OF RESERVATIONS 572 ESSEX STREET BEVERLY,MA 01915		NON-PROFIT	NEW BEDFORD YOUTH CORPS 2013	3,667
Total  3a				2,691,006

Form 990PF Part XV Line 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				
THE TRUSTEES OF RESERVATIONS 572 ESSEX STREET BEVERLY,MA 01915		NON-PROFIT	SOUTH COAST NEW BEDFORD	20,000
THIRD SECTOR OF NEW ENGLAND 89 SOUTH STREET 7TH FLOOR BOSTOM,MA 02111		NON-PROFIT	THE CARROT PROJECT/SMALL FARM LOAN PROGRAM FOR MASSACHUSETTS	15,000
THIRD SECTOR OF NEW ENGLAND 89 SOUTH STREET 7TH FLOOR BOSTON,MA 02111		NON-PROFIT	SEAPLAN WORKSHOP TO FOSTER COOPERATION IN THE NEW BEDFORD WIND ENERGY	15,000
THOMPSON ISLAND OUTWARD BOUND EDUCATION CENTER PO BOX 127 BOSTON,MA 02127		NON-PROFIT	CONNECTIONS	50,000
TOXICS ACTION CENTER 44 WINTER STREET 4TH FLOOR BOSTON,MA 02108		NON-PROFIT	SOUTHEASTERN MASSACHUSETTS NEIGHBORHOOD ASSISTANCE PROGRAM	10,000
TREES THAT FEED 1200 HILL RD WINNETKA,IL 60093		NON-PROFIT	GENERAL SUPPORT	7,222
TRI-COUNTY MUSIC ASSOCIATION PO BOX 414 ROCHESTER,MA 02770	HANNAH MOORE PRESIDENT	NON-PROFIT	GENERAL SUPPORT	5,000
TRI-COUNTY MUSIC ASSOCIATION PO BOX 414 ROCHESTER,MA 02770	HANNAH MOORE PRESIDENT	NON-PROFIT	SCHOLARSHIP ENDOWMENT	50,000
TRIPS FOR KIDS NEW BEDFORD INC 224 BROCK STREET NEW BEDFORD,MA 02744		NON-PROFIT	GENERAL SUPPORT	10,000
UNITED INTERFAITH ACTION OF SOUTHEASTERN MASSACHUSETTS 160 ROCK STREET FALL RIVER,MA 02720		NON-PROFIT	GENERAL SUPPORT	15,000
UNITED WAY OF GREATER ATTLEBORO TAUNTON 247 MAPLE STREET ATTLEBORO,MA 02703		NON-PROFIT	SOUTH COAST REGIONAL NETWORK TO END HOMELESSNESS	10,000
UNITED WAY OF GREATER NEW BEDFORD 105 WILLIAM STREET 3RD FLOOR NEW BEDFORD,MA 02740		NON-PROFIT	COMMUNITY BUILDING MINI-GRANTS PROGRAM GENERAL SUPPORT	40,000
UNITED WAY OF GREATER NEW BEDFORD 105 WILLIAM STREET 3RD FLOOR NEW BEDFORD,MA 02740		NON-PROFIT	HUNGER COMMISSION	45,000
UNITED WAY OF GREATER NEW BEDFORD 105 WILLIAM STREET 3RD FLOOR NEW BEDFORD,MA 02740		NON-PROFIT	SUMMER FUND 2013	45,000
UNIVERSITY OF MASSACHUSETTS DARTMOUTH 265 OLD WESTPORT ROAD DARTMOUTH,MA 02747		NON-PROFIT	UPWARD BOUND STUDENT LEADERSHIP & COLLEGE TOURS	10,000
Total  3a				2,691,006

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
UNIVERSITY OF PRETORIAMAMMAL RESEARCH INSTITUTE MAMMAL RESEARCH INSTITUTE PRETORIA SF		FOREIGN PUBLIC CHARI	CONTINUATION OF WHALE RESEARCH IN SOUTH AFRICA	60,000
WHALE AND DOLPHIN CONSERVATION INC 7 NELSON STREET PLYMOUTH,MA 02360		NON-PROFIT	ACT RIGHT NOW SPEAKER HONORARIUM	1,000
WHALEWATERFRONT HISTORIC AREA LEAGUE 128 UNION STREET NEW BEDFORD,MA 02740		NON-PROFIT	GENERAL SUPPORT/ NEW DOLLARS/NEW PARTNERS	15,000
WILDLANDS TRUST PO BOX 2282 DUXBURY,MA 02331		NON-PROFIT	WILDLANDS TRUST OPERATING SUPPORT	20,000
WOODS HOLE OCEANOGRAPHIC INSTITUTIN FENNO HOUSE MS 40A WOODS HOLE,MA 02543	MICHAEL MOORE EMPLOYEE	NON-PROFIT	EVALUATING THE SOUNDSCAPE NEAR CAPE WIND	25,000
WOODS HOLE RESEARCH CENTER 149 WOODS HOLE ROAD FALMOUTH,MA 02540		NON-PROFIT	CAPE CODE AND ISLANDS CLIMATE CHANGE AND ENERGY SUMMIT	10,000
YMCA SOUTHCOAST 18 SO WATER STREET NEW BEDFORD,MA 02740	JO-ANN WATSON EMPLOYEE	NON-PROFIT	SHARING THE HARVEST COMMUNITY FARM	15,000
YOUR THEATER 998 WILDWOOD STREET NEW BEDFORD,MA 02745		NON-PROFIT	GENERAL SUPPORT	3,000
YWCA OF SOUTHEASTERN MASSACHUSETTS 20 SOUTH SIXTH STREET NEW BEDFORD,MA 02740		NON-PROFIT	RACIAL JUSTICE OUTREACH AND EDUCATION PROGRAM	30,000
YWCA OF SOUTHEASTERN MASSACHUSETTS 20 SOUTH SIXTH STREET NEW BEDFORD,MA 02740		NON-PROFIT	UNDER ONE ROOF CAMPAIGN	100,000
ZEITERION 684 PURCHASE STREET NEW BEDFORD,MA 02740		NON-PROFIT	OPEARATIONAL SUPPORT CAPACITY BUILDING	25,000
Total  3a				2,691,006

Form **4562**

Department of the Treasury
Internal Revenue Service (99)

Depreciation and Amortization
(Including Information on Listed Property)

▶ See separate instructions. ▶ Attach to your tax return.

OMB No 1545-0172

2013

Attachment
Sequence No **179**

Name(s) shown on return
ISLAND FOUNDATION INC

Business or activity to which this form relates
FORM 990-PF PAGE 1

Identifying number

04-2670567

Part I Election To Expense Certain Property Under Section 179

Note: If you have any listed property, complete Part V before you complete Part I.

1	Maximum amount (see instructions)	1	500,000
2	Total cost of section 179 property placed in service (see instructions)	2	
3	Threshold cost of section 179 property before reduction in limitation (see instructions)	3	2,000,000
4	Reduction in limitation Subtract line 3 from line 2 If zero or less, enter -0-	4	
5	Dollar limitation for tax year Subtract line 4 from line 1 If zero or less, enter -0- If married filing separately, see instructions	5	

6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost	
7	Listed property Enter the amount from line 29	7		
8	Total elected cost of section 179 property Add amounts in column (c), lines 6 and 7	8		
9	Tentative deduction Enter the smaller of line 5 or line 8	9		
10	Carryover of disallowed deduction from line 13 of your 2012 Form 4562	10		
11	Business income limitation Enter the smaller of business income (not less than zero) or line 5 (see instructions)	11		
12	Section 179 expense deduction Add lines 9 and 10, but do not enter more than line 11	12		
13	Carryover of disallowed deduction to 2014 Add lines 9 and 10, less line 12	13		

Note: Do not use Part II or Part III below for listed property. Instead, use Part V.

Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property) (See instructions)

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year (see instructions)	14	
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	8,096

Part III MACRS Depreciation (Do not include listed property.) (See instructions.)

Section A

17	MACRS deductions for assets placed in service in tax years beginning before 2013	17	
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here		

Section B—Assets Placed in Service During 2013 Tax Year Using the General Depreciation System

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only—see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property						
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs		S/L	
h Residential rental property			27 5 yrs	MM	S/L	
			27 5 yrs	MM	S/L	
i Nonresidential real property	2013-08	7,800	39 yrs	MM	S/L	75
			39 yrs	MM	S/L	

Section C—Assets Placed in Service During 2013 Tax Year Using the Alternative Depreciation System

20a Class life					S/L	
b 12-year			12 yrs		S/L	
c 40-year			40 yrs	MM	S/L	

Part IV Summary (see instructions.)

21	Listed property Enter amount from line 28	21	
22	Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21 Enter here and on the appropriate lines of your return Partnerships and S corporations—see instructions	22	8,171
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

Part V

Listed Property (Include automobiles, certain other vehicles, certain computers, and property used for entertainment, recreation, or amusement.)
Note: For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete **only** 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable.

Section A—Depreciation and Other Information (Caution: See the instructions for limits for passenger automobiles.)

24a Do you have evidence to support the business/investment use claimed? ☐ Yes ☐ No						24b If "Yes," is the evidence written? ☐ Yes ☐ No		
(a) Type of property (list vehicles first)	(b) Date placed in service	(c) Business/ investment use percentage	(d) Cost or other basis	(e) Basis for depreciation (business/investment use only)	(f) Recovery period	(g) Method/ Convention	(h) Depreciation/ deduction	(i) Elected section 179 cost
25Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use (see instructions)						25		
26 Property used more than 50% in a qualified business use								
		%						
		%						
		%						
27 Property used 50% or less in a qualified business use								
		%				S/L -		
		%				S/L -		
		%				S/L -		
28 Add amounts in column (h), lines 25 through 27 Enter here and on line 21, page 1						28		
29 Add amounts in column (i), line 26 Enter here and on line 7, page 1							29	

Section B—Information on Use of Vehicles

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person
If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles

30 Total business/investment miles driven during the year (do not include commuting miles)	(a) Vehicle 1		(b) Vehicle 2		(c) Vehicle 3		(d) Vehicle 4		(e) Vehicle 5		(f) Vehicle 6	
31 Total commuting miles driven during the year												
32 Total other personal(noncommuting) miles driven												
33 Total miles driven during the year Add lines 30 through 32												
34 Was the vehicle available for personal use during off-duty hours?	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
35 Was the vehicle used primarily by a more than 5% owner or related person?												
36 Is another vehicle available for personal use?												

Section C—Questions for Employers Who Provide Vehicles for Use by Their Employees

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who **are not** more than 5% owners or related persons (see instructions)

37 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?	Yes	No
38 Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? See the instructions for vehicles used by corporate officers, directors, or 1% or more owners		
39 Do you treat all use of vehicles by employees as personal use?		
40 Do you provide more than five vehicles to your employees, obtain information from your employees about the use of vehicles, and retain the information received?		
41 Do you meet the requirements concerning qualified automobile demonstration use? (See instructions)		
Note: If your answer to 37, 38, 39, 40, or 41 is "Yes," do not complete Section B for the covered vehicles		

Part VI Amortization

(a) Description of costs	(b) Date amortization begins	(c) Amortizable amount	(d) Code section	(e) Amortization period or percentage	(f) Amortization for this year
42 Amortization of costs that begins during your 2013 tax year (see instructions)					
43 Amortization of costs that began before your 2013 tax year				43	
44 Total. Add amounts in column (f) See the instructions for where to report				44	

TY 2013 Accounting Fees Schedule**Name:** ISLAND FOUNDATION INC**EIN:** 04-2670567

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ELIASSEN CPA	13,460	1,346	0	0

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2013 Depreciation Schedule

Name: ISLAND FOUNDATION INC
EIN: 04-2670567

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
BUILDING	1989-01-30	150,150	90,096	SL	40 0000000000000	3,754	0	3,754	
DONATED FURNITURE	1989-07-06	17,166	17,166	SL	7 0000000000000	0	0	0	
OFFICE CHAIR	1989-11-17	280	280	SL	7 0000000000000	0	0	0	
LIBRARY SHELVES	1992-07-23	1,800	1,800	SL	7 0000000000000	0	0	0	
13 CHAIRS AND 1 DESK	2006-12-01	1,936	1,685	SL	7 0000000000000	251	0	251	
DESK & DRAWERS	2008-09-24	620	378	SL	7 0000000000000	89	0	89	
4 FILING CABINETS	2008-07-21	796	503	SL	7 0000000000000	114	0	114	
FILING CABINETS	1990-02-12	356	356	SL	7 0000000000000	0	0	0	
IKON COPIER	2010-02-15	5,408	2,190	SL	7 0000000000000	773	0	773	
COMPUTER	2003-07-31	3,288	3,288	SL	5 0000000000000	0	0	0	
COMPUTER	2004-01-01	384	384	SL	5 0000000000000	0	0	0	
DELL COMPUTER	2005-09-30	1,468	1,468	SL	5 0000000000000	0	0	0	
DIGITAL PROJECTOR	2005-11-30	1,310	1,310	SL	5 0000000000000	0	0	0	
PHOTOCOPIER	2006-12-29	2,552	2,550	SL	5 0000000000000	0	0	0	
MACBOOK	2008-03-26	1,649	1,567	SL	5 0000000000000	82	0	82	
APPLE MINI HP MONITOR AND PRINTER	2009-07-13	1,129	791	SL	5 0000000000000	226	0	226	
MAC LAPTOP HARDWARE AND SOFTWARE	2009-08-28	2,344	1,559	SL	5 0000000000000	469	0	469	
LAND	1989-01-30	44,850		L		0	0	0	
BUILDING IMPROVEMENTS	2010-03-25	9,139	644	SL	39 0000000000000	234	0	234	
STONE WALL	2001-10-31	15,879	4,545	SL	39 0000000000000	407	0	407	

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
WINDOWS	2001-11-30	12,659	3,602	SL	39 0000000000000	325	0	325	
HANDICAP RAMP AND BATHROOM	2002-03-22	10,627	2,924	SL	39 0000000000000	272	0	272	
DRIVEWAY PAVING (7,286 SQ FT)	2006-05-01	16,495	7,333	SL	15 0000000000000	1,100	0	1,100	
WINDOWS	2013-08-27	7,800		SL	39 0000000000000	75	0	75	

TY 2013 Investments - Other Schedule

Name: ISLAND FOUNDATION INC

EIN: 04-2670567

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
	AT COST	61,290,982	61,290,982

TY 2013 Land, Etc. Schedule

Name: ISLAND FOUNDATION INC
 EIN: 04-2670567

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
BUILDING	150,150	93,850	56,300	
DONATED FURNITURE	17,166	17,166	0	
OFFICE CHAIR	280	280	0	
LIBRARY SHELVES	1,800	1,800	0	
13 CHAIRS AND 1 DESK	1,936	1,936	0	
DESK & DRAWERS	620	467	153	
4 FILING CABINETS	796	617	179	
FILING CABINETS	356	356	0	
IKON COPIER	5,408	2,963	2,445	
COMPUTER	3,288	3,288	0	
COMPUTER	384	384	0	
DELL COMPUTER	1,468	1,468	0	
DIGITAL PROJECTOR	1,310	1,310	0	
PHOTOCOPIER	2,552	2,550	2	
MACBOOK	1,649	1,649	0	
APPLE MINI HP MONITOR AND PRINTER	1,129	1,017	112	
MAC LAPTOP HARDWARE AND SOFTWARE	2,344	2,028	316	
LAND	44,850	0	44,850	
BUILDING IMPROVEMENTS	9,139	878	8,261	
STONE WALL	15,879	4,952	10,927	
WINDOWS	12,659	3,927	8,732	
HANDICAP RAMP AND BATHROOM	10,627	3,196	7,431	
DRIVEWAY PAVING (7,286 SQ FT)	16,495	8,433	8,062	
WINDOWS	7,800	75	7,725	

TY 2013 Legal Fees Schedule

Name: ISLAND FOUNDATION INC

EIN: 04-2670567

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
HEMENWAY & BARNES	2,133	213	0	0

TY 2013 Other Expenses Schedule

Name: ISLAND FOUNDATION INC

EIN: 04-2670567

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
DUES AND SUBSCRIPTIONS	11,447	1,145	0	0
INSURANCE	5,009	501	0	0
OFFICE EXPENSES	21,738	2,174	0	0
TELEPHONE	3,487	349	0	0

TY 2013 Other Increases Schedule**Name:** ISLAND FOUNDATION INC**EIN:** 04-2670567

Description	Amount
UNREALIZED GAIN	4,061,868
BOOK TAX DIFFERENCE CONTRIBUTIONS	18,000
DEFERRED FEDERAL EXCISE TAX	115,751

TY 2013 Other Liabilities Schedule**Name:** ISLAND FOUNDATION INC**EIN:** 04-2670567

Description	Beginning of Year - Book Value	End of Year - Book Value
DEFERRED FEDERAL EXCISE TAX	58,589	174,340
FEDERAL EXCISE TAX PAYABLE	0	53,859

TY 2013 Other Professional Fees Schedule**Name:** ISLAND FOUNDATION INC**EIN:** 04-2670567

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
AEQUITAS INVESTMENTS	30,000	30,000	0	0
PAYROLL SERVICE FEE	2,257	226	0	0
MISCELLANEOUS FEES	0	0	0	0

TY 2013 Taxes Schedule**Name:** ISLAND FOUNDATION INC**EIN:** 04-2670567

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PAYROLL TAXES	11,611	1,161	0	0
INVESTMENT EXCISE TAXES	95,219	0	0	0
FORM PC MA TAX	1,037	104	0	0