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Form 990-PF

Return of Private Foundation

OMB No 1545-0052

Department of the Treasury
Internal Revenue Service

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

Do not enter Social Security numbers on this form as it may be made public.

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 EDMUND & BETSY CABOT CHARITABLE FNDN		A Employer identification number 04-2900424
Number and street (or P O box number if mail is not delivered to street address) C/O CABOT-WELLINGTON LLC 70 FEDERAL ST	Room/suite	B Telephone number 617.451.1744
City or town, state or province, country, and ZIP or foreign postal code BOSTON, MA 02110		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 9,929,466.	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received	6,541,552.			
2	Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
3	Interest on savings and temporary cash investments	14.	14.		STATEMENT 1
4	Dividends and interest from securities	41,064.	41,064.		STATEMENT 2
5a	Gross rents	-529.	-529.		STATEMENT 3
b	Net rental income or (loss)	-529.			
6a	Net gain or (loss) from sale of assets not on line 10	65,651.			
b	Gross sales price for all assets on line 6a	530,360.			
7	Capital gain net income (from Part IV, line 2)		65,651.		
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	7,269.	5,886.	1,383.	STATEMENT 4
12	Total. Add lines 1 through 11	6,655,021.	112,086.	1,383.	
13	Compensation of officers, directors, trustees, etc	0.	0.	0.	0.
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees				
b	Accounting fees STMT 5	10,600.	5,300.	0.	5,300.
c	Other professional fees STMT 6	24,603.	12,003.	0.	12,600.
17	Interest				
18	Taxes STMT 7	3,859.	2,567.	0.	0.
19	Depreciation and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses STMT 8	23,161.	23,126.	0.	35.
24	Total operating and administrative expenses. Add lines 13 through 23	62,223.	42,996.	0.	17,935.
25	Contributions, gifts, grants paid	217,250.			217,250.
26	Total expenses and disbursements. Add lines 24 and 25	279,473.	42,996.	0.	235,185.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	6,375,548.			
b	Net investment income (if negative, enter -0-)		69,090.		
c	Adjusted net income (if negative, enter -0-)			1,383.	

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LHA For Paperwork Reduction Act Notice, see instructions.

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	3,670.	68.	68.
	2 Savings and temporary cash investments	56,358.	853,151.	853,151.
	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 9	150,299.	150,299.	189,169.
	b Investments - corporate stock STMT 10	411,824.	3,417,453.	4,601,965.
	c Investments - corporate bonds			
	Liabilities	11 Investments - land, buildings, and equipment basis		
Less accumulated depreciation				
12 Investments - mortgage loans				
13 Investments - other STMT 11		1,458,818.	4,016,103.	4,284,571.
14 Land, buildings, and equipment basis				
Less accumulated depreciation				
15 Other assets (describe PREPAID TAXES)		3,774.	542.	542.
16 Total assets (to be completed by all filers - see the instructions Also, see page 1, item 1)		2,084,743.	8,437,616.	9,929,466.
17 Accounts payable and accrued expenses				
18 Grants payable				
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe)			
23 Total liabilities (add lines 17 through 22)	0.	0.		
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			
	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	2,186,691.	2,186,691.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	-101,948.	6,250,925.	
30 Total net assets or fund balances	2,084,743.	8,437,616.		
31 Total liabilities and net assets/fund balances	2,084,743.	8,437,616.		

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	2,084,743.
2 Enter amount from Part I, line 27a	2	6,375,548.
3 Other increases not included in line 2 (itemize)	3	0.
4 Add lines 1, 2, and 3	4	8,460,291.
5 Decreases not included in line 2 (itemize) BOOK/TAX DIFFERENCES	5	22,675.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	8,437,616.

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			
b SEE ATTACHED STATEMENT			
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			
b			
c			
d			
e 530,360.		464,709.	65,651.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			
b			
c			
d			
e			65,651.

2 Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	2	65,651.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	<div> <div>If gain, also enter in Part I, line 8, column (c)</div> <div>If (loss), enter -0- in Part I, line 8</div> </div>	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	142,093.	2,591,024.	.054840
2011	83,461.	2,615,322.	.031912
2010	104,545.	2,625,604.	.039818
2009	71,913.	2,597,700.	.027683
2008	124,214.	2,284,366.	.054376

2 Total of line 1, column (d)	2	.208629
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	.041726
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	3,647,644.
5 Multiply line 4 by line 3	5	152,202.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	691.
7 Add lines 5 and 6	7	152,893.
8 Enter qualifying distributions from Part XII, line 4	8	235,185.

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)	1	691.
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> 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	0.
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	3	691.
3	Add lines 1 and 2	4	0.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	5	691.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		
6	Credits/Payments		
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	2,042.
b	Exempt foreign organizations - tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	2,000.
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	4,042.
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	3,351.
11	Enter the amount of line 10 to be Credited to 2014 estimated tax <input checked="" type="checkbox"/> 3,351. 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
2 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers <input checked="" 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 checked="" type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes.		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	X	
b If "Yes," has it filed a tax return on Form 990-T for this year?	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" 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	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		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address N/A				
14	The books are in care of CABOT-WELLINGTON LLC	Telephone no	617.451.1744	
	Located at 70 FEDERAL STREET, BOSTON, MA	ZIP+4	02110	
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 checked="" type="checkbox"/> Yes	<input 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)?	1b	X
Organizations relying on a current notice regarding disaster assistance check here		
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)	2b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here		
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.)	3b	N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 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

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
ELIZABETH W. CABOT	TRUSTEE			
70 FEDERAL STREET, 7TH FLOOR				
BOSTON, MA 02110	1.00	0.	0.	0.
BRADFORD W. CABOT	TRUSTEE			
70 FEDERAL STREET, 7TH FLOOR				
BOSTON, MA 02110	1.00	0.	0.	0.

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

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

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

0

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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	1,525,603.
b	Average of monthly cash balances	1b	123,425.
c	Fair market value of all other assets	1c	2,054,164.
d	Total (add lines 1a, b, and c)	1d	3,703,192.
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	3,703,192.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	55,548.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3,647,644.
6	Minimum investment return. Enter 5% of line 5	6	182,382.

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	182,382.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	691.	
b	Income tax for 2013 (This does not include the tax from Part VI)	2b	54.	
c	Add lines 2a and 2b	2c	745.	
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	181,637.	
4	Recoveries of amounts treated as qualifying distributions	4	0.	
5	Add lines 3 and 4	5	181,637.	
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	181,637.	

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	235,185.
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	235,185.
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	691.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	234,494.

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

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				181,637.
2 Undistributed income, if any, as of the end of 2013			0.	
a Enter amount for 2012 only				
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2013				
a From 2008	3,666.			
b From 2009				
c From 2010				
d From 2011				
e From 2012	15,126.			
f Total of lines 3a through e	18,792.			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$	235,185.			
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				181,637.
e Remaining amount distributed out of corpus	53,548.			
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:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	72,340.			
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				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7	3,666.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	68,674.			
10 Analysis of line 9.				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
d Excess from 2012	15,126.			
e Excess from 2013	53,548.			

N/A

- ☐ 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				
SEE ATTACHED SCHEDULE				217,250.
Total			3a	217,250.
b Approved for future payment				
NONE				
Total			3b	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) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount		
1 Program service revenue						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments						
3 Interest on savings and temporary cash investments			14	14.		
4 Dividends and interest from securities			14	41,064.		
5 Net rental income or (loss) from real estate						
a Debt-financed property						
b Not debt-financed property			16	-529.		
6 Net rental income or (loss) from personal property						
7 Other investment income			16	5,886.		
8 Gain or (loss) from sales of assets other than inventory			18	65,651.		
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue						
a <u>INSURANCE PREMIUM REFUND</u>				1,383.		
b _____						
c _____						
d _____						
e _____						
12 Subtotal. Add columns (b), (d), and (e)		0.		113,469.		0.
13 Total. Add line 12, columns (b), (d), and (e)						113,469.

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

[illegible]

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

		Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		
a	Transfers from the reporting foundation to a noncharitable exempt organization of		
	(1) Cash	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.					May the IRS discuss this return with the preparer shown below (see instr.)? <input checked="checked" type="checkbox"/> Yes <input type="checkbox"/> No
	<div style="display: flex; justify-content: space-between;"> <div style="width: 40%;"> </div> <div style="width: 20%; text-align: center;"> Nov 13-14 </div> <div style="width: 35%; text-align: center;"> TRUSTEE </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div style="width: 40%;">Signature of officer or trustee</div> <div style="width: 20%; text-align: center;">Date</div> <div style="width: 35%; text-align: center;">Title</div> </div>					
Paid Preparer Use Only	Print/Type preparer's name DOUGLAS FARRINGTON	Preparer's signature 	Date 11/12/14	Check <input type="checkbox"/> if self-employed	PTIN P00370668	
	Firm's name ▶ MARCUM LLP				Firm's EIN ▶ 11-1986323	
	Firm's address ▶ 53 STATE STREET, FLOOR 38 BOSTON, MA 02109				Phone no (617) 742-9666	

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and
its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2013

Name of the organization

EDMUND & BETSY CABOT CHARITABLE FNDN

Employer identification number

04-2900424

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐

501(c)() (enter number) organization

☐

4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐

527 political organization

Form 990-PF

☒

501(c)(3) exempt private foundation

☐

4947(a)(1) nonexempt charitable trust treated as a private foundation

☐

501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒

For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

☐

For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐

For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐

For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions of \$5,000 or more during the year ▶ \$

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2013)

Name of organization

Employer identification number

EDMUND & BETSY CABOT CHARITABLE FNDN

04-2900424

Part I Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	EDMUND B. CABOT CHARITABLE SHARE TRUST 2003 70 FEDERAL STREET BOSTON, MA 02110	\$ 5,926,783.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)
2	EDMUND B. CABOT CHARITABLE SHARE TRUST 2003 70 FEDERAL STREET BOSTON, MA 02110	\$ 614,769.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Employer identification number

04-2900424

Part II

[illegible]

Name of organization

Employer identification number

EDMUND & BETSY CABOT CHARITABLE FNDN

04-2900424

Part III

Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once) ▶ \$

Use duplicate copies of Part III if additional space is needed.

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

EDMUND & BETSY CABOT CHARITABLE FNDN

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 FIDELITY	P	VARIOUS	12/31/13
b LONG-TERM FIDELITY	P	VARIOUS	12/31/13
c LONG-TERM FIDELITY	P	VARIOUS	12/31/13
d LONG-TERM PARTNERSHIPS	P	VARIOUS	12/31/13
e 1231 GAIN - PARTNERSHIP	P	VARIOUS	12/31/13
f SHORT-TERM PARTNERSHIPS	P	VARIOUS	12/31/13
g SALE OF CIELTA YACHT	P	VARIOUS	11/20/13
h CAPITAL GAINS DIVIDENDS			
i			
j			
k			
l			
m			
n			
o			

(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 21.		21.	0.
b 41,848.		32,329.	9,519.
c 155,107.		94,859.	60,248.
d 57,959.			57,959.
e 2,228.			2,228.
f 8,242.			8,242.
g 261,000.		337,500.	-76,500.
h 3,955.			3,955.
i			
j			
k			
l			
m			
n			
o			

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col. (k), but not less than "-0-")
a			0.
b			9,519.
c			60,248.
d			57,959.
e			2,228.
f			8,242.
g			-76,500.
h			3,955.
i			
j			
k			
l			
m			
n			
o			

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	65,651.
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

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
NATIONAL FINANCIAL SERVICES	14.	14.	14.
TOTAL TO PART I, LINE 3	14.	14.	14.

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
INVESTMENT PARTNERSHIPS/US INTEREST	16,484.	0.	16,484.	16,484.	16,484.
STOCKS AND MUTUAL FUNDS	23,537.	3,955.	19,582.	19,582.	19,582.
US TREASURY	3,227.	0.	3,227.	3,227.	3,227.
US TREASURY OID	1,771.	0.	1,771.	1,771.	1,771.
TO PART I, LINE 4	45,019.	3,955.	41,064.	41,064.	41,064.

FORM 990-PF RENTAL INCOME STATEMENT 3

KIND AND LOCATION OF PROPERTY	ACTIVITY NUMBER	GROSS RENTAL INCOME
INVESTMENT PARTNERSHIPS	1	-529.
TOTAL TO FORM 990-PF, PART I, LINE 5A		-529.

FORM 990-PF

OTHER INCOME

STATEMENT

4

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
INVESTMENT PARTNERSHIPS	2,785.	2,785.	0.
CANCELLATION OF DEBT INCOME FROM PARTNERSHIPS	63.	63.	0.
ORDINARY INCOME FROM PARTNERSHIPS	1,938.	1,938.	0.
ROYALTY INCOME FROM PARTNERSHIPS	1,130.	1,130.	0.
SEC. 1256 CONTRACTS INCOME FROM PARTNERSHIPS	-30.	-30.	0.
INSURANCE PREMIUM REFUND	1,383.	0.	1,383.
TOTAL TO FORM 990-PF, PART I, LINE 11	7,269.	5,886.	1,383.

FORM 990-PF

ACCOUNTING FEES

STATEMENT

5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX PREPARATION	10,600.	5,300.	0.	5,300.
TO FORM 990-PF, PG 1, LN 16B	10,600.	5,300.	0.	5,300.

FORM 990-PF

OTHER PROFESSIONAL FEES

STATEMENT

6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT	11,746.	11,746.	0.	0.
SPDP GOLD INVESTMENT FEES	257.	257.	0.	0.
OFFICE EXPENSES	12,600.	0.	0.	12,600.
TO FORM 990-PF, PG 1, LN 16C	24,603.	12,003.	0.	12,600.

FORM 990-PF	TAXES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FOREIGN TAXES WITHHELD ON DIVIDENDS	372.	372.	0.	0.	
EXCISE TAX: FORM 990-PF PARTNERSHIP FOREIGN TAXES PAID	1,292.	0.	0.	0.	
PARTNERSHIP JAPANESE TAXES PAID	2,186.	2,186.	0.	0.	
	9.	9.	0.	0.	
TO FORM 990-PF, PG 1, LN 18	3,859.	2,567.	0.	0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	8
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
MA FILING FEES	35.	0.	0.	35.	
PARTNERSHIP INVESTMENT EXPENSES	23,126.	23,126.	0.	0.	
TO FORM 990-PF, PG 1, LN 23	23,161.	23,126.	0.	35.	

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS			STATEMENT	9
DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE	
	X		150,299.	189,169.	
TOTAL U.S. GOVERNMENT OBLIGATIONS			150,299.	189,169.	
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS					
TOTAL TO FORM 990-PF, PART II, LINE 10A			150,299.	189,169.	

FORM 990-PF	CORPORATE STOCK	STATEMENT 10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
	3,417,453.	4,601,965.
TOTAL TO FORM 990-PF, PART II, LINE 10B	3,417,453.	4,601,965.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT 11
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
	COST	4,016,103.	4,284,571.
TOTAL TO FORM 990-PF, PART II, LINE 13		4,016,103.	4,284,571.

FORM 990-PF	PART XV - LINE 1A LIST OF FOUNDATION MANAGERS	STATEMENT 12
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NAME OF MANAGER

ELIZABETH W. CABOT
BRADFORD W. CABOT

Bonds: Line 10a

<u>Description</u>	<u>Quantity</u>	<u>Cost Basis</u>	<u>Current Value</u>
US Treasury Note (TIPS) 1/15/2014 (2%)	50,000	51,145	63,159
US Treasury Note (TIPS) 1/15/2015 (1.74%)	100,000	99,154	126,010
		150,299	189,169

Common Stock: Line 10b

Abbott Laboratories	5,000	149,370	191,650
Abbvie	5,000	161,979	264,050
Apple	190	126,396	106,594
Cabot Microelectronics	2,250.000	74,858	102,825
Cabot Oil & Gas Corp	3,200.000	32,710	124,032
Conoco Phillips	5,350	303,827	377,978
CVS Corp	3,850	161,368	275,545
EMC Corp	12,000	312,409	301,800
Gilead Sciences	6,100	165,806	458,110
Golar LNG Ltd	11,000	402,052	399,190
Itau Unibanco (ADR)	11,000	158,100	149,270
Monsanto Corp.	3,600	313,596	419,580
Northern Trust Corp	500	18,978	30,945
Oracle	8,860	266,067	338,984
Qualcom	3,450	198,139	256,163
Schlumberger Ltd	4,450	297,169	400,990
Stryker Corp	4,850	248,606	364,429
United Technologies	350	26,023	39,830
		3,417,453	4,601,965

Mutual Funds and Investment Partnerships: Line 13

AESIP (Asia) Fund LP *	74.917	263,402	261,707
Sanderson International Value Fund *	144.777	269,157	317,067
CW Hedge Fund I * (++)	86.560	100,000	124,898
CW Hedge Fund II * (++)	200.000	200,000	274,120
EBC Family Investment LLC*	3.280	481,477	637,677
Park Street Natural Resource Fund*	42.625	37,906	42,625
Cabot Wellington Real Asset Fund 2011*	47.000	46,233	47,000
Cabot Wellington Real Estate Fund I *	50.000	21,880	19,256
Cabot Wellington Real Estate Fund II *	44.000	25,631	28,674
Cabot Wellington Real Estate Fund III *	65,275.000	53,671	60,556
CW Private Equity 2007 LLC *	137.250	116,591	130,628
CW Private Equity Fund 2011*	35.250	26,161	34,305
CW Venture Fund IV LLC *	81.500	49,486	75,651

SPDR Goldshares ETF	3,100.000	448,142	359,972
T. Rowe Small-Cap Value Fund	735.335	26,235	37,039
Montibus Small Cap Growth (I)	2,391.904	26,035	33,678
Matthews Asia Small Companies Fund	7,353.857	118,397	142,224
Matthews Pacific India (I) Fund	1,729.349	25,785	28,206
Matthews Pacific Tiger (I) Fund	7,970.299	185,468	199,018
T. Rowe Price Latin America	5,726.418	201,655	171,850
Aberdeen Emerging Debt	40,362.146	384,614	350,747
Loomis Sayles Bond Fund (Inst)	23,471.854	354,919	355,833
Loomis Sayles Bond Fund (Ret)	3,839.443	40,122	57,937
SPDR DB Int'l Govt Infl Pro Bond	8,450.000	513,136	493,903
		4,016,103	4,284,571

Edmund and Betsy Cabot Charitable Foundation 04-2900424
Form 990-PF for the Calendar Year 2013
Schedule of Charitable Contributions

None of the donees is an individual, all gifts were made in furtherance of the exempt purposes of the donee organizations

<u>Charitable Organizations</u>	<u>Date</u>	<u>Contributions</u>
American Alpine Club	9/20/13	\$ 1,000 00
American Repertory Theater	9/30/13	\$ 1,000 00
Appalachian Mountain Club	7/2/13	\$ 2,000 00
Associates of Boston Public Library	8/13/13	\$ 25,000 00
Beaver Country Day	9/12/13	\$ 1,000 00
Beth Israel Hospital	9/12/13	\$ 2,500 00
Boston Athenæum	9/12/12	\$ 1,000 00
Boston Landmarks Orchestra	9/20/13	\$ 2,000 00
Boston Lyric Opera of NE	9/12/13	\$ 2,000 00
Boston Museum of Science	6/24/13	\$ 5,000 00
Boston Skating Club	7/22/13	\$ 10,000 00
Boston Symphony Orchestra	9/12/13	\$ 1,000 00
Cantata Singers, Inc	9/12/13	\$ 1,000 00
Children's Hospital	9/12/13	\$ 1,000 00
Children's Museum of Boston	9/12/13	\$ 1,000 00
Colorado College	4/18/13	\$ 20,000 00
Colorado College - Matching Funds Drive	10/4/13	\$ 5,000 00
Conservatory Lab Charter School	4/18/13	\$ 1,000 00
Craig Hospital	9/12/13	\$ 1,000 00
Culebra Range Community Coalition	4/18/13	\$ 4,000 00
Dana Hall School	9/12/13	\$ 1,000 00
Emerald Necklace Conservatory	4/18/13	\$ 2,000 00
Executive Service Corps	9/20/13	\$ 500 00
Family to Family Project	9/12/13	\$ 1,000 00
Fessenden School	9/12/13	\$ 1,000 00
Foundation for Belmont Education	9/20/13	\$ 1,000 00
Friends of Harvard Skiing	9/12/13	\$ 1,000 00
Greater Boston Food Bank	9/20/13	\$ 1,000 00
Habitat Institute	9/12/13	\$ 500 00
Handel & Haydn Society	12/3/13	\$ 2,500 00
Harvard College Fund	9/12/13	\$ 1,000 00
Harvard Medical School	9/12/13	\$ 5,000 00
High Mountain Institute	4/18/13	\$ 20,000 00
Huntington Theatre Company	9/12/13	\$ 5,000 00
Hurricane Island	9/12/13	\$ 1,000 00
Island Institute	9/12/13	\$ 2,500 00
Land Conservation Fund	11/19/13	\$ 10,000 00
Lesley University	8/20/13	\$ 25,000 00
Lesley University	12/10/13	\$ 10,000 00
Literary Lights for Children Associates of Boston Public Library	8/13/13	\$ 1,000 00
Maine Island Trail Association	9/12/13	\$ 1,000 00
Max Warburg Courage Curriculum	4/18/13	\$ 2,000 00
Mount Auburn Hospital	9/20/13	\$ 1,000 00
Museum of Fine Arts	9/12/13	\$ 1,000 00
New England Aquarium	9/12/13	\$ 1,000 00
New England Baptist Hospital	9/20/13	\$ 1,000 00
New England Conservatory	9/12/13	\$ 1,000 00
Orphans of Rwanda	9/12/13	\$ 1,000 00
Passim	6/24/13	\$ 500 00
Pine Street Inn	9/20/13	\$ 1,000 00
Powers Music School	9/12/13	\$ 5,000 00
Procter Academy	9/12/13	\$ 1,000 00
Quest Adventures	8/13/13	\$ 6,000 00
Rocky Mountain Elk Foundation	9/12/13	\$ 1,000 00
Rosie's Place	9/20/13	\$ 1,000 00
Sailors for the Sea	9/12/13	\$ 5,000 00
Search For Common Ground	9/20/13	\$ 250 00
The 1891 Society - TTOR	9/20/13	\$ 1,000 00
The Fenn School	9/20/13	\$ 1,000 00
Thompson Island	9/20/13	\$ 1,000 00
WGBH Channel 2	9/20/13	\$ 3,000 00
Woods Hole Oceanographic Inst	9/20/13	\$ 1,000 00
Young Audiences of Mass	9/20/13	\$ 1,000 00
		<u>\$ 217,250.00</u>