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# Form **990**Department of the Treasury

Internal Revenue Service

## **Return of Organization Exempt From Income Tax**

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

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

▶ Information about Form 990 and its instructions is at www.irs.gov/form990

2013
Open to Public Inspection

OMB No. 1545-0047

A F	or th	e 2013 calendar year, or tax year beginning	, 2013	and end	ing			, 20	
_		C Name of organization EDITH STEWART CHASE FOUND	ATION	- AGEN	CA D	Employer id	entification	number	
Вс	heck if ap	plicable 001378							
	Addre					04-324	2344		
	Name	change Number and street (or P O box if mail is not delivered to street address)		Room/suite	E	Telephone n	umber		
	Instial	roturn 300 EAST MAIN STREET							
	Termi	City or town, state or province, country, and ZIP or foreign postal code							
	Amer	MILIFORD, MA 01737-2800			G	Gross receip	ts \$	278	3 <u>,370</u> .
	Applii pendi				H	<ul><li>(a) Is this a grou subordinates</li></ul>		Yes	X No
					Н	(b) Are all subords			No No
_			1947(a)(1)	or 5	27	If 'No,' attac	h a list (see i	nstructions)	
		te ▶ N/A		1		(c) Group exemp			
		of organization   Corporation   X Trust   Association   Other		L Year	of formation	1994 <b>M</b>	State of leg	al domicile	<u>MA</u>
<u>Pa</u>	art I	Summary							
	1	Briefly describe the organization's mission or most significant activities							
၁၁	İ	SEE SCHEDULE O							
rnai	_								
Governance	2	Check this box  If the organization discontinued its operations o					1 1		
Ğ	3	Number of voting members of the governing body (Part VI, line 1a)					3		
Activities &	4	Number of independent voting members of the governing body (Part VI,					4		370370
<u>viti</u>	5	Total number of individuals employed in calendar year 2013 (Part V, line					5		NONE
Ç	6	Total number of volunteers (estimate if necessary)		• • • • •	. <b></b> .		6		NONE
_		Total unrelated business revenue from Part VIII, column (C), line 12					7a		NONE
_	Ь	Net unrelated business taxable income from Form 990-T, line 34	• • • • •	<u></u>		Prior Year	7b	Current Ye	NONE
		0							
e	8	Contributions and grants (Part VIII, line 1h)				11,7	72		9 <u>,329</u> .
Revenue	9	Program service revenue (Part VIII, line 2g)				27 0	F 2	<del></del>	122
æ	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d).	<u></u>		•	27,8	54		<u>5,423</u> .
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 1 te)		• •   • • •	•	30 E	<u> </u>		5,752.
	12	Total revenue - add lines 8 through 11 (must equal Part VIII) column (A),	.line=12}	18	+	39,5			5, 1 <u>52</u> . 5, 392.
	13	Grants and similar amounts paid (Part IX, column (A); lines 1-3)  Benefits paid to or for members (Part IX, column (A), (Inc. 4) MAY .1. 9	2014	-181	•	28,7 2,0			$\frac{5,392}{3,200}$
	14	Salaries, other compensation, employee benefits (PartiX, column (A), line 4) MAY . 1. 9	.2.034 .	- ∞ ···	•		<del></del>		<u>, 200</u> .
ses	15	<del></del>	es 5-10).	 	•				
Expenses		Professional fundraising fees (Part IX, column (A), line 14e) Total fundraising expenses (Part IX, column (D), line 25)		NIE'	•				
찣	17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)			ļ	18,1	96	1 (	3,214
	18	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25				48,9			2,806
	19	Revenue less expenses Subtract line 18 from line 12			•	-9,3	<del></del>		2,946.
- Se S		nevenue less expenses Subtract line to nontline 12			Beginnig	ng of Current \		End of Yes	
anc.	20	Total assets (Part X, line 16)			203	808,7			L,700.
et Assets and Balan	21	Total liabilities (Part X, line 26)		• • • • •	•		ONE		NONE
und.	22	Net assets or fund balances Subtract line 21 from line 20		• • • • •	•	808,7	_	811	
Pa	rt II	Signature Block	· · · · ·	• • • •	•	000,7	<u> </u>		<u>-, , , , , , , , , , , , , , , , , , , </u>
Un	der per	nalties of perjury, I declare that I have examined this return, including accompany	yıng schedu	ules and state	ements, and	to the best of	my knowle	edge and b	elief, it is
tru	e, corre	ct, and complete Declaration of preparer (other than officer) is based on all information	ation of whi	ich preparer h	nas any knov	vledge I			
		Margaret QQ i Dorle are				05/0	9/2014		
Sig		Signature of officer				Date	- /		
He	re	MARGARET A BILODEN TREIS	VREP						
		Type or print name and title	7						
_		Print/Type preparer's name Preparer's signature	1	Date		Check	if PTIN		
Paid		GORDON POWERS	me	25/09	/2014	self-employ	ed F	002601	194
	parer	Firm's name ERNST & YOUNG U.S. LLP			1	ırm's EIN 🕨	34-656		
Use	Only	Firm's address ► 200 CLARENDON STREET; BOSTON, M	IA 021	116				0-8810	<u> </u>
May	the I	RS discuss this return with the preparer shown above? (see instructions)		<u></u>		. <u></u>	X		No
For	Paper	work Reduction Act Notice, see the separate instructions.						Form <b>99</b>	



1 - M

orr	90 (2013) Page
Pa	Statement of Program Service Accomplishments Check if Schedule O contains a response or note to any line in this Part III
1	riefly describe the organization's mission
	ASSIST RETIRED MEMBERS OF THE RETIRED EDUCATORS ASSOCIATION OF
	ASSACHUSETTS (REAM) WHO ARE IN NEED OF ASSISTANCE ON A TEMPORARY
	ASIS.
_	
2	d the organization undertake any significant program services during the year which were not listed on the ior Form 990 or 990-EZ? Yes X N "Yes," describe these new services on Schedule O
3	d the organization cease conducting, or make significant changes in how it conducts, any program rivices?
	"Yes," describe these changes on Schedule O
4	escribe the organization's program service accomplishments for each of its three largest program services, as measured spenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to othe e total expenses, and revenue, if any, for each program service reported.
	ode:) (Expenses \$9,329including grants of \$9,329) (Revenue \$)  EAM
1b	ode:) (Expenses \$ including grants of \$) (Revenue \$)
10	ode. ) (Expenses \$ including grants of \$ ) (Revenue \$ )
**	/ (Lexpenses #
	ther program services (Describe in Schedule O)
- 4	xpenses \$ including grants of \$ ) (Revenue \$ )
40	httpl program convex expenses • 0 220

Part	Checklist of Required Schedules		V	l N-
	In the annual of annual or antique FO1/aV2V are 4047/aV1V /ather than a new rate foundation \2.16 #Was #		Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A	1	Х	
2	Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)?	2	Α_	Х
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to	_		
•	candidates for public office? If "Yes," complete Schedule C, Part I	3		Х
4	Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h)	<u> </u>		
•	election in effect during the tax year? If "Yes," complete Schedule C, Part II.	4		Х
5	Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues,			
_	assessments, or similar amounts as defined in Revenue Procedure 98-197 If "Yes," complete Schedule C,			
	Part III	5		Х
6	Did the organization maintain any donor advised funds or any similar funds or accounts for which donors			
	have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If			
	"Yes," complete Schedule D, Part I	6		X
7	Did the organization receive or hold a conservation easement, including easements to preserve open space,			
	the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II	7		X
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes,"			
	complete Schedule D, Part III	8		X
9	Did the organization report an amount in Part X, line 21, for escrow or custodial account liability; serve as a			
	custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or			٠,,
	debt negotiation services? If "Yes," complete Schedule D, Part IV	9		X
10	Did the organization, directly or through a related organization, hold assets in temporarily restricted			v
	endowments, permanent endowments, or quasi-endowments? If "Yes," complete Schedule D, Part V	10		X
11	If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI,			
_	VII, VIII, IX, or X as applicable  Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes,"			1
a	complete Schedule D, Part VI	11a		Х
h	Did the organization report an amount for investments-other securities in Part X, line 12 that is 5% or more	<del></del>		- 21
	of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII	11ь		X
c	Did the organization report an amount for investments-program related in Part X, line 13 that is 5% or more	· · · ·		
•	of its total assets reported in Part X, line 167 If "Yes," complete Schedule D, Part VIII.	11c		Х
d	Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets			
	reported in Part X, line 167 If "Yes," complete Schedule D, Part IX	11d		Х
е	Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X	11e		X
f	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses			
	the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part $X$	11f		X
12 a	Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes,"			
	complete Schedule D, Parts XI and XII	12a		X
b	Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if			
	the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional	12b		X
13	Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	13		X
	Did the organization maintain an office, employees, or agents outside of the United States?	14a		X
D	Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate			l
	foreign investments valued at \$100,000 or more? If "Yes," complete Schedule F, Parts I and IV	14b		Х
15	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or	140		
13	for any foreign organization? If "Yes," complete Schedule F, Parts II and IV	15		Х
16	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other			
	assistance to or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV	16		Х
17	Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on			
	Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I (see instructions)	17		Х
18	Did the organization report more than \$15,000 total of fundraising event gross income and contributions on			
	Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II	18		Х
19	Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a?	1		
	If "Yes," complete Schedule G, Part III	19		X
	Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H	20a		X
b	If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	20b		<u> </u>

<u>Part</u>	Checklist of Required Schedules (continued)		r	
			Yes	No
21	Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or			
	government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II	21		X
22	Did the organization report more than \$5,000 of grants or other assistance to individuals in the United States		i	
	on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III	22		X
23	Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the			
	organization's current and former officers, directors, trustees, key employees, and highest compensated			
	employees? If "Yes," complete Schedule J	23		Х
24 a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than			
	\$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b			
	through 24d and complete Schedule K. If No, go to line 25a	24a	]	Х
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b		Х
	Did the organization maintain an escrow account other than a refunding escrow at any time during the year			
	to defease any tax-exempt bonds?	24c		Х
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		Х
	Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in an excess benefit transaction			
	with a disqualified person during the year? If "Yes," complete Schedule L, Part I	25a		Х
b	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior			
-	year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ?	1		
	If "Yes," complete Schedule L, Part L	25b		X
26	Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payable to any			<del>                                     </del>
	current or former officers, directors, trustees, key employees, highest compensated employees, or			
	disqualified persons? If so, complete Schedule L, Part II.	26		X
27	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee,			
21	substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled	ł		
	entity or family member of any of these persons? If "Yes," complete Schedule L, Part III	27		X
20	Was the organization a party to a business transaction with one of the following parties (see Schedule L,	-		^
28	Part IV instructions for applicable filing thresholds, conditions, and exceptions):			
_	•	28a		x
	A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV	204	l	
D	A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete	204		X
	Schedule L, Part IV.	28b		<del>  ^</del>
C	An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof)	20-		<sub>v</sub>
	was an officer, director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV	28c		X
29	Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M	29		<u> </u>
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified			,,,
	conservation contributions? If "Yes," complete Schedule M	30		X
31	Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N,			,,
	Part I	31		X
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes,"			١
	complete Schedule N, Part II	32		X
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations			l
	sections 301 7701-2 and 301 7701-3? If "Yes," complete Schedule R, Part I	33		X
34	Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III,			
	or IV, and Part V, line 1	34		X
35 a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a		X
b	If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a			
	controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2	35b		X
36	Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable			
	related organization? If "Yes," complete Schedule R, Part V, line 2	36		Х
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization			
	and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R,	!		
	Part VI	37		Х
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and			
	19? Note. All Form 990 filers are required to complete Schedule O	38	Х	
			000	100101

Par				
	Check if Schedule O contains a response or note to any line in this Part V	<u></u>		
_	F		Yes	No
	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable	1		
		-		
C	Did the organization comply with backup withholding rules for reportable payments to vendors and			ļ
2.	reportable gaming (gambling) winnings to prize winners?	1c	Х	
Za	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax  Statements, filed for the calendar year ending with or within the year covered by this return  2a  0			
h	Statements, filed for the calendar year ending with or within the year covered by this return 0 lf at least one is reported on line 2a, did the organization file all required federal employment tax returns?	2b	<u> </u>	
b	Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)	20		
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a		X
	If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation in Schedule O	3b		
	At any time during the calendar year, did the organization have an interest in, or a signature or other authority			
	over, a financial account in a foreign country (such as a bank account, securities account, or other financial			
	account)?	4a		Х
ь	If Yes, enter the name of the foreign country: ▶			
	See instructions for filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts			
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a		X
	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b		Х
С	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?	5с		
	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the			
	organization solicit any contributions that were not tax deductible as charitable contributions?	6a		X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or			
	gifts were not tax deductible?	6b		
7	Organizations that may receive deductible contributions under section 170(c).			
а	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods	i		
	and services provided to the payor?	7a		X
	If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b		
С	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was	_		37
	required to file Form 8282?	7c		X
	If "Yes," indicate the number of Forms 8282 filed during the year	- <del></del>		
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e 7f		X
-	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?			X
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g 7h		X
8"	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?  Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting	-"		Λ
Ü	organizations. Did the supporting organization, or a donor advised fund maintained by a sponsoring	1		
	organization, have excess business holdings at any time during the year?	8		X
9	Sponsoring organizations maintaining donor advised funds.			- 21
а	Did the organization make any taxable distributions under section 4966?	9a		X
	Did the organization make a distribution to a donor, donor advisor, or related person?	9b		Х
10	Section 501(c)(7) organizations. Enter:			
а	Initiation fees and capital contributions included on Part VIII, line 12	ļ		
	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities 10b			
11	Section 501(c)(12) organizations. Enter			
а	Gross income from members or shareholders			
b	Gross income from other sources (Do not net amounts due or paid to other sources			
	against amounts due or received from them )			
12a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12a		
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year			
13	Section 501(c)(29) qualified nonprofit health insurance issuers.	$\sqcup$		
а	Is the organization licensed to issue qualified health plans in more than one state?	13a		
	Note. See the instructions for additional information the organization must report on Schedule O.			
b	Enter the amount of reserves the organization is required to maintain by the states in which			
	the organization is licensed to issue qualified health plans			
	Enter the amount of reserves on hand	4.6		
	Did the organization receive any payments for indoor tanning services during the tax year?	14a		X
p	in ites, has it med a form 720 to report these payments? If INO. Drovide an explanation in Schedule U	14b	1 <b>I</b>	

	Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O.			
	Check if Schedule O contains a response or note to any line in this Part VI			
Sect	ion A. Governing Body and Management			Щ.
	ion 71 Governing Body and Managonicite		Yes	N
1a	Enter the number of voting members of the governing body at the end of the tax year · · · · . 1a		1	†
	If there are material differences in voting rights among members of the governing body, or if the governing			
	body delegated broad authority to an executive committee or similar committee, explain in Schedule O	1		
b	Enter the number of voting members included in line 1a, above, who are independent 1b			
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with	1		l
_	any other officer, director, trustee, or key employee?	2	i	:
3	Did the organization delegate control over management duties customarily performed by or under the direct			
	supervision of officers, directors, or trustees, or key employees to a management company or other person?	3		:
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4		
5	Did the organization become aware during the year of a significant diversion of the organization's assets?	5		
6	Did the organization have members or stockholders?	6	X	
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint			
	one or more members of the governing body?	7a	X	
b	Are any governance decisions of the organization reserved to (or subject to approval by) members,			
	stockholders, or persons other than the governing body?	7b	X	
8	Did the organization contemporaneously document the meetings held or written actions undertaken during			
	the year by the following			
а	The governing body?	8a	Х	┖
b	Each committee with authority to act on behalf of the governing body?	8b	X	<u> </u>
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at			
	the organization's mailing address? If "Yes," provide the names and addresses in Schedule O	9	<u> </u>	
ecti	on B. Policies (This Section B requests information about policies not required by the Internal Revenue	e Cod		Ι
			Yes	N
	Did the organization have local chapters, branches, or affiliates?	10a	X	⊢
b	If "Voc." did the organization have written noticine and procedures governing the activities of such chanters.			
~	If "Yes," did the organization have written policies and procedures governing the activities of such chapters,	401		1
	affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	10b	v	
11a	affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? .	10b 11a	Х	
l 1a b	affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . Describe in Schedule O the process, if any, used by the organization to review this Form 990	11a	Х	
11a b 12a	affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . Describe in Schedule O the process, if any, used by the organization to review this Form 990 Did the organization have a written conflict of interest policy? If "No," go to line 13		Х	,
11a b 12a	affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . Describe in Schedule O the process, if any, used by the organization to review this Form 990 Did the organization have a written conflict of interest policy? If "No," go to line 13	11a 12a	Х	2
11a b 12a b	affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . Describe in Schedule O the process, if any, used by the organization to review this Form 990 Did the organization have a written conflict of interest policy? If "No," go to line 13	11a	Х	2
11a b 12a b	affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . Describe in Schedule O the process, if any, used by the organization to review this Form 990 Did the organization have a written conflict of interest policy? If "No," go to line 13	11a 12a 12b	X	2
11a b 12a b	affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . Describe in Schedule O the process, if any, used by the organization to review this Form 990 Did the organization have a written conflict of interest policy? If "No," go to line 13	11a 12a 12b	X	
11a b 12a b c	affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . Describe in Schedule O the process, if any, used by the organization to review this Form 990  Did the organization have a written conflict of interest policy? If "No," go to line 13	11a 12a 12b 12c 13		
11a b 12a b c	affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . Describe in Schedule O the process, if any, used by the organization to review this Form 990  Did the organization have a written conflict of interest policy? If "No," go to line 13	11a 12a 12b	X	
11a b 12a b c	affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . Describe in Schedule O the process, if any, used by the organization to review this Form 990  Did the organization have a written conflict of interest policy? If "No," go to line 13	11a 12a 12b 12c 13		
11a b 12a b c 13 14	affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . Describe in Schedule O the process, if any, used by the organization to review this Form 990  Did the organization have a written conflict of interest policy? If "No," go to line 13	11a 12a 12b 12c 13 14	X	
11a b 12a b c 13 14	affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . Describe in Schedule O the process, if any, used by the organization to review this Form 990 Did the organization have a written conflict of interest policy? If "No," go to line 13	11a 12a 12b 12c 13 14	X	2
11a b 12a b c 13 14	affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . Describe in Schedule O the process, if any, used by the organization to review this Form 990  Did the organization have a written conflict of interest policy? If "No," go to line 13	11a 12a 12b 12c 13 14	X	
11a b 12a b c 13 14 15	affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . Describe in Schedule O the process, if any, used by the organization to review this Form 990 Did the organization have a written conflict of interest policy? If "No," go to line 13	11a 12a 12b 12c 13 14	X	
11a b 12a b c 13 14 15	affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . Describe in Schedule O the process, if any, used by the organization to review this Form 990 Did the organization have a written conflict of interest policy? If "No," go to line 13	11a 12a 12b 12c 13 14 15a 15b	X	2
11a b 12a b c 13 14 15 a b	affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . Describe in Schedule O the process, if any, used by the organization to review this Form 990 Did the organization have a written conflict of interest policy? If "No," go to line 13	11a 12a 12b 12c 13 14	X	2
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11a b 12a b c 13 14 15 a b	affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . Describe in Schedule O the process, if any, used by the organization to review this Form 990 Did the organization have a written conflict of interest policy? If "No," go to line 13	11a 12a 12b 12c 13 14 15a 15b	X	
11a b 12a b c 13 14 15 a b	affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . Describe in Schedule O the process, if any, used by the organization to review this Form 990 Did the organization have a written conflict of interest policy? If "No," go to line 13	11a 12a 12b 12c 13 14 15a 15b	X	2
11a b 12a b c 13 14 15 a b	affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	11a 12a 12b 12c 13 14 15a 15b	X	2
11a b 12a b c 13 14 15 a b	affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . Describe in Schedule O the process, if any, used by the organization to review this Form 990 Did the organization have a written conflict of interest policy? If "No," go to line 13	11a 12a 12b 12c 13 14 15a 15b 16a	X X X	on
11a b 12a b c 13 14 15 a b	affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	11a 12a 12b 12c 13 14 15a 15b 16a	X X X	on

300 E. MAIN STREET; MILFORD, MA 01757-0228

Form **990** (2013)

Form 990 (2013) Page 7

## 'Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Check if Schedule O contains a response or note to any line in this Part VII.........

### Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's current officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation Enter -0- in columns (D), (E), and (F) if no compensation was paid
  - List all of the organization's current key employees, if any. See instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's former officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations
- List all of the organization's former directors or trustees that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors, institutional trustees; officers; key employees, highest compensated employees; and former such persons.

X Check this box if neither the organization nor	any related	orgai	nızat	tion	cor	npens	sate	d any current offic	er, director, or trus	tee
(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	box,	unles	Posi ieck is pe	rson	n oth st Highest compensated	an	(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
(1) MILFORD NATIONAL BANK						ed				
Trustee		ĺ	Х					NONE	NONE	NONE
(2) John Harmon Advisory Board				Х				NONE	NONE	NONE
(3) Margaret Bilodeau Trustee				Х				NONE	NONE	NONE
(4) Marjorie Burns Advisory Board				Х				NONE	NONE	NONE
(5) Anne Broder Advisory Board				Х				NONE	NONE	NONE
(6) Eleanor Calvin Advisory Board				Х				NONE	NONE	NONE
(7) Paul Coakley Trustee				Х				NONE	NONE	NONE
(8) Particia DeConto Advisory Board				Х				NONE	NONE	NONE
(9) Anne Demont Trustee				Х				NONE		NONE
(10) Barbara Lombardo Trustee				Х				NONE		NONE
(11) Faith Manzer Advisory Board				Х				NONE	NONE	NONE
(12) Sharon McArdle Advisory Board				Х				NONE		NONE
(13) John Hooper Advisory Board				Х				NONE		NONE
(14) Hugh Knox Executive Director	<b></b>			Х				NONE		NONE

Form 990 (2013)

Part VII Section A. Officers, Directors, Tru	stees, Ke	y Em	plo	уе	es,	and F	ligl	nest Compensat	ed Employees	(continued)
(A) Name and title	Average hours per week (list any hours for related organizations	box, office	unle:	Pos neck ss pe	rson	than on the structure of the structure o	an	(D)  Reportable compensation from the organization	(E)  Reportable compensation fro related organizations (W-2/1099-MISC	other compensation
	below dotted line)	Individual trustee or director	Institutional trustee		Key employee	Highest compensated employee		(W-2/1099-MISC)		organization and related organizations
(15) Justine McComiskey Advisory Board				Х				NONE	NON	E NONI
(16) Alex Nardacci Advisory Board				Х				NONE	NON	E NON!
(17) Robert Nelson Trustee				Х				NONE	NON	E NONI
(18) Christine Hassan Trustee				х				NONE	NON	E NON
(19) Barbara Sokolowski Advisory Board				Х				NONE	NON	E NON
(20) Kathleen Tudryn Advisory Board				х				NONE	NON	E NON
(21)										
(22)										
(23)										
(24)										
(25)										
1b Sub-total	ection A .						<b>* * *</b>	NONE	NO	NE NON
Total number of individuals (including but not reportable compensation from the organization)	limited to						o r		1	11011
3 Did the organization list any former offi employee on line 1a? If "Yes," complete School	cer, direct		r tr							Yes No
4 For any individual listed on line 1a, is the organization and related organizations gundividual	reater thai	n \$1	50,0 · ·		? .	f Ye	· s,	complete Sched	ule J for such	4
5 Did any person listed on line 1a receive of for services rendered to the organization? If Y										
Section B. Independent Contractors  1 Complete this table for your five highest cor compensation from the organization. Report year	npensated compensat	ındep ion fo	end or th	ent e ca	cor alen	ntracto dar y	ors ear	that received mor ending with or wit	e than \$100,000 thin the organiza	O of Ition's tax
(A) Name and business add	dress						-	(B) Description of se	rvices	(C) Compensation
							+			
							+			
2 Total number of independent contractors received more than \$100,000 of compensations.							to )	those listed ab	ove) who	

		Check if Schedule O contains a response or	1	(A)	(B)	(C)	(D)
				Total revenue	Related or exempt function revenue	Unrelated business revenue	Revenue excluded from tax under sections 512-514
t s	1a	Federated campaigns 1a					
and Other Similar Amounts	b	Membership dues 1b					
A E	С	Fundraising events 1c					
ia	d	Related organizations 1d					1
<u> </u>	e	Government grants (contributions) 1e					1
ē	f	All other contributions, gifts, grants,			ł		
ह		and similar amounts not included above . 1f	9,329				! !
밀	g	Noncash contributions included in lines 1a-1f \$					-
	h	Total Add lines 1a-1f		9,329.			
Program Service Revenue		Busine	ess Code			<del> </del>	
ě	2a						
9	b		-				
֡֟֟֟ <u>֟</u>	C			-			
š	d						<del></del>
ᇤ	e						
<u></u>	f	All other program service revenue Land Innes 2a-2f					1
_	3						
	3	Investment income (including dividends, interest, and other similar amounts)		27,394.			27,39
	4	Income from investment of tax-exempt bond proceeds		3.			
	5	Royalties · · · · · · · · · · · · · · · · · · ·	" <b>. </b>				
	9		ersonal		•		
	6.	Gross rents					
ĺ	6a b	Less rental expenses					
	c	Rental income or (loss)					
	d	Net rental income or (loss)	▶				
Į	_	(i) Securities (ii)	Other				1
	7a	Gross amount from sales of assets other than inventory 241, 644					
-	ь	Less cost or other basis					
İ		and sales expenses 232,618					
	c	Gain or (loss)	_				
	d	Net gain or (loss)	▶	9,026.	9,026.		
<b>.</b>	8a	Gross income from fundraising					
_		events (not including \$					
<b>S</b>		of contributions reported on line 1c)					
~		See Part IV, line 18					]
Other Revenu	b	Less direct expenses b					
ੋਂ ਹੋ	C	Net income or (loss) from fundraising events	<u> ▶</u>				
_	9a	Gross income from gaming activities					
		See Part IV, line 19 a					
	b	Less direct expenses b					_
- 1	C	Net income or (loss) from gaming activities	<u> ▶</u>				ļ
	l Oa	Gross sales of inventory, less returns and allowances					
	Ь	Less cost of goods sold b					_
	С	Net income or (loss) from sales of inventory					<del> </del>
		Miscellaneous Revenue Busin	ess Code				_
-	11a						
	b						
	С						<del> </del>
	d	All other revenue					<del> </del>
	е	Total. Add lines 11a-11d	▶∟				
[ -	12	Total revenue See instructions		45,752.	9,026.		27,39

Page 10

## Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete co	olumn (A	1)
---	----------	----

	Check if Schedule O contains a responsionation include amounts reported on lines 6b, 7b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service	(C) Management and	(D) Fundraising
	· ·		expenses	general expenses	expenses
1	Grants and other assistance to governments and organizations in the United States See Part IV, line 21.				
	· ·				
2	Grants and other assistance to individuals in the United States See Part IV, line 22	16,392.	16,392.		
2	Grants and other assistance to governments,	10,372.	10,322.		
3	organizations, and individuals outside the				
	United States See Part IV, lines 15 and 16				
4	Benefits paid to or for members	8,200.	8,200.		
	Compensation of current officers, directors,	0,200.	3,200.		
•	trustees, and key employees				
6	Compensation not included above, to disqualified			-	
_	persons (as defined under section 4958(f)(1)) and				
	persons described in section 4958(c)(3)(B)				
7	Other salaries and wages				
	Pension plan accruals and contributions (include section				
-	401(k) and 403(b) employer contributions)				
9	Other employee benefits				
10	Payroll taxes				
	Fees for services (non-employees)				
а	Management	8,559.		8,559.	
	Legal			<u> </u>	
c	Accounting	690.		690.	
d	Lobbying				
е	Professional fundraising services See Part IV, line 17.				<del></del>
f	Investment management fees				
g	Other (If line 11g amount exceeds 10% of line 25, column				
	(A) amount, list line 11g expenses on Schedule O)	35.	35.		
12	Advertising and promotion				
13	Office expenses	1,703.	1,703.		··-
14	Information technology				
	Royalties	4 110	-	4 110	
	Occupancy	4,112.	2 202	4,112.	
	Travel	2,393.	2,393.		· · · ·
18	Payments of travel or entertainment expenses				
	for any federal, state, or local public officials				
	Conferences, conventions, and meetings				
	Interest				
	Payments to affiliates	<del></del>			
	Depreciation, depletion, and amortization	250.	250.		
	Other expenses Iteman expenses not revered	250.	250.		
<b>4</b> 4	Other expenses Itemize expenses not covered above (List miscellaneous expenses in line 24e If				H
	line 24e amount exceeds 10% of line 25, column				
	(A) amount, list line 24e expenses on Schedule O)				
n					
d					
-	All other expenses	472.	236.	236.	
	Total functional expenses Add lines 1 through 24e	42,806.	29,209.	13,597.	NONE
	Joint costs. Complete this line only if the	,		,	
	organization reported in column (B) joint costs				
	from a combined educational campaign and fundraising solicitation Check here				
	following SOP 98-2 (ASC 958-720)				
JSA					Form 990 (2013)

## Form 990 (2013) Page Y Balance Sheet

Pa	rt X	Balance Sheet		-	
		Check if Schedule O contains a response or note to any line in this Pa	rt X		
			(A) Beginning of year		( <b>B</b> ) End of year
	1	Cash - non-interest-bearing	454.	1	1,996.
	2	Savings and temporary cash investments	57,582.	2	192,534.
	3	Pledges and grants receivable, net	5,225.	3	7,776.
	4	Accounts receivable, net		4	
	5	Loans and other receivables from current and former officers, directors,			
		trustees, key employees, and highest compensated employees.			
	6	Complete Part II of Schedule L  Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary		5 6	
ts	7	organizations (see instructions) Complete Part II of Schedule L  Notes and loans receivable, net		7	
Assets	8	Inventories for sale or use		8	
A	9	Prepaid expenses and deferred charges		9	
	_	Land, buildings, and equipment. cost or			
	.00	other basis. Complete Part VI of Schedule D			
	ь	Less: accumulated depreciation 10b		10c	
	11	Investments - publicly traded securities	745,493.	11	609,394.
	12	Investments - other securities. See Part IV, line 11	, 15 / 155 .	12	003/331.
	13	Investments - program-related See Part IV, line 11		13	<del></del>
	14	Intangible assets	·· · · · · · · · · · · · · · · · ·	14	
	15	Other assets See Part IV, line 11		15	
	16	Total assets. Add lines 1 through 15 (must equal line 34)	808,754.	16	811,700.
	17	Accounts payable and accrued expenses	•	17	•
	18	Grants payable		18	
	19	Deferred revenue		19	
	20	Tax-exempt bond liabilities		20	
es	21	Escrow or custodial account liability Complete Part IV of Schedule D		21	
Liabilities	22	Loans and other payables to current and former officers, directors,			
iab		trustees, key employees, highest compensated employees, and			
		disqualified persons Complete Part II of Schedule L		22	
	23	Secured mortgages and notes payable to unrelated third parties		23	
	24	Unsecured notes and loans payable to unrelated third parties		24	<del>-</del> ::
	25	Other liabilities (including federal income tax, payables to related third			
		parties, and other liabilities not included on lines 17-24). Complete Part X			
		of Schedule D		25	
	26	Total liabilities. Add lines 17 through 25	NONE	26	NONE
es		Organizations that follow SFAS 117 (ASC 958), check here X and complete lines 27 through 29, and lines 33 and 34.			
anc	27	Unrestricted net assets	808,754.	27	811,700.
Bal	28	Temporarily restricted net assets		28	
pu	29	Permanently restricted net assets		29	
Net Assets or Fund Balances		Organizations that do not follow SFAS 117 (ASC 958), check here and complete lines 30 through 34.			
ts	30	Capital stock or trust principal, or current funds		30	
SSe	31	Paid-in or capital surplus, or land, building, or equipment fund		31	
t A	32	Retained earnings, endowment, accumulated income, or other funds [		32	
Š	33	Total net assets or fund balances	808,754.	33	811,700.
	34	Total liabilities and net assets/fund balances	808,754.	34	811,700. Form <b>990</b> (2013)

Form **990** (2013)

orm 99	, 90 (2013)				Pa	ge <b>12</b>
Part	XI Reconciliation of Net Assets					
	Check if Schedule O contains a response or note to any line in this Part XI		<u>.</u>	<u></u> .		
1	Total revenue (must equal Part VIII, column (A), line 12)	1			45,	752.
2	Total expenses (must equal Part IX, column (A), line 25)	2			42,	806.
3	Revenue less expenses. Subtract line 2 from line 1	3		2,94		946.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4		8	08,	754.
5	Net unrealized gains (losses) on investments	5				
6	Donated services and use of facilities	6				
7	Investment expenses	7				
8	Prior period adjustments	8				
9	Other changes in net assets or fund balances (explain in Schedule O)	9				
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line					
	33. column (B))	10		8	11,	<u>700.</u>
Part						
	Check if Schedule O contains a response or note to any line in this Part XII					1
					Yes	No
1	Accounting method used to prepare the Form 990. X Cash Accrual Other					
	If the organization changed its method of accounting from a prior year or checked "Other," e	xplaır	ın			
	Schedule O					
2a	a Were the organization's financial statements compiled or reviewed by an independent accountant?					
	If "Yes," check a box below to indicate whether the financial statements for the year were com-	piled	or			}
	reviewed on a separate basis, consolidated basis, or both:					
	Separate basis Consolidated basis Both consolidated and separate basis					
b	b Were the organization's financial statements audited by an independent accountant?					X
	If "Yes," check a box below to indicate whether the financial statements for the year were audi	ted o	n a			
	separate basis, consolidated basis, or both.					
	Separate basis Consolidated basis Both consolidated and separate basis					
С	if "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for overs	aht				
	he audit, review, or compilation of its financial statements and selection of an independent accountant?					
	If the organization changed either its oversight process or selection process during the tax year, e					
	Schedule O					
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set	forth	ın ın			
	the Single Audit Act and OMB Circular A-133?			3a		Х
b	If "Yes," did the organization undergo the required audit or audits? If the organization did not und					
	required audit or audits, explain why in Schedule O and describe any steps taken to undergo such au			3b		

#### SCHEDULE A (Form 990 or 990-EZ)

## **Public Charity Status and Public Support**

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust

OMB No 1545-0047

Department of the Treasury Internal Revenue Service ► Attach to Form 990 or Form 990-EZ
►Information about Schedule A (Form 990 or 990-EZ) and its instructions is at www irs gov/form990

Onen to Public Inspection

	the organization							Embio	=	incation nur	nber
	STEWART CHASE									242344	
Part I			s (All organizations mu						uctions		
	The organization is not a private foundation because it is: (For lines 1 through 11, check only one box.)										
1	A church, convention of churches, or association of churches described in section 170(b)(1)(A)(i).										
2			(1)(A)(ii). (Attach Schedul		_						
3	1		ervice organization descri								_
4	,	= :	erated in conjunction wi	ith a h	ospita	descri	bed in	section	170(t	o)(1)(A)(iii).	Enter the
	hospital's name, city, and state										
5	An organization operated for the benefit of a college or university owned or operated by a governmental unit described in										
	section 170(b)(1)(A)(iv). (Complete Part II.)										
6	A federal, state, or local government or governmental unit described in section 170(b)(1)(A)(v).										
7	An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in section 170(b)(1)(A)(vi). (Complete Part II.)										
• _	1			-1-4- [							
8 —	,		on 170(b)(1)(A)(vi) (Com	•						h:- f	
9	, -		es' (1) more than 331/3%								
	•		exempt functions - subj								
	· · ·		ome and unrelated busi						1 511	tax) from	businesses
10	1		ne 30, 1975 See section ed exclusively to test for page 2015.			-			١		
11 X		•	rated exclusively for the		-					or to car	ry out the
· · <u> </u>			ipported organizations de								
			es the type of supporting								00 0000001
	a X Type I	b Type II	c Type III-Function							nctionally ii	ntegrated
e			e organization is not cont		_					•	•
			other than one or more								
	or section 509(a)(2						•				
f	If the organization	received a writte	n determination from the	e IRS	that it	ıs a Ty	pe I, T	ype II,	or Typ	e III suppo	rting
	-										🗍
g	Since August 17, 2	006, has the orgai	nization accepted any gift	or cor	tributi	on from	any of	the			
	following persons?										
	(i) A person who	directly or indirect	tly controls, either alone	or tog	ether v	with per	sons de	escribed	d ın (ıi)	and	Yes No
	(III) below, the	governing body of	the supported organization	on?						11g(	i) X
	(ii) A family memb	er of a person des	cribed in (i) above?							11g(	
	(iii) A 35% controll	ed entity of a pers	on described in (i) or (ii) a	bove?						11g(i	ii) X
h	Provide the following	ng information abo	ut the supported organiza	tion(s	)						
(i) N	Name of supported (ii) EIN organization		(iii) Type of organization			(v) Did you notify				(vii) Amount of moneta	
			(described on lines 1-9 above or IRC section	coi (i)	listed in	the orga	of your			support	
			(see instructions))	docu	overning ment?	support?		in the	ŬS?		
				Yes	No	Yes	No	Yes	No		
(A)											
	SEE PART IV			ļ	ļ	ļ					
(B)											
						ļ					
(C)											
					-	<del>                                     </del>					
(D)					•						
					<del> </del>				<u> </u>	<del> </del>	
(E)											
				<u> </u>		<del>                                     </del>	ļ				
Total											
	rwork Reduction Act N	otice, see the Instru	ctions for		•	_		Sc	nedule A	(Form 990 or	990-EZ) 2013
	0 or 990-EZ.										

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Sec	Section A. Public Support N/A								
Caler	ndar year (or fiscal year beginning in)	(a) 2009	<b>(b)</b> 2010	(c) 2011	(d) 2012	(e) 2013	(f) Total		
1	Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants")								
2	Tax revenues levied for the organization's benefit and either paid to or expended on its behalf								
3	The value of services or facilities furnished by a governmental unit to the organization without charge				-				
4	Total Add lines 1 through 3								
5	The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)	1							
6	Public support. Subtract line 5 from line 4				<u> </u>	l	L		
	tion B. Total Support	(a) 2009	(b) 2010	(c) 2011	(d) 2012	(e) 2013	(f) Total		
	ndar year (or fiscal year beginning in)	(a) 2009	(B) 2010	(6) 2011	(0) 2012	(e) 2013	(I) IOIai		
7 8	Amounts from line 4								
9	Net income from unrelated business activities, whether or not the business is regularly carried on					_	. –		
10	Other income Do not include gain or loss from the sale of capital assets (Explain in Part IV)	1							
11	Total support Add lines 7 through 10		<u> </u>		L	ļ			
12	Gross receipts from related activities, etc. (s	ee instructions) .				12			
13	First five years. If the Form 990 is forganization, check this box and stop here								
Sec	tion C. Computation of Public Sup				-				
14	Public support percentage for 2013 (li	ne 6, column (f	) divided by line	11, column (f))		14	%		
15	Public support percentage from 2012	Schedule A, Pa	rt II, line 14			15	%_		
16a	331/3% support test - 2013. If the o	rganization did	not check the	box on line 13	, and line 14 is	331/3% or mo			
	this box and <b>stop here</b> . The organization qualifies as a publicly supported organization								
b	331/3% support test - 2012. If the c	•							
	check this box and <b>stop here</b> . The organization qualifies as a publicly supported organization								
17a	a 10%-facts-and-circumstances test - 2013. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is								
10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop he</b> Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publi									
	_			_			1 1		
h	organization								
b 10%-facts-and-circumstances test - 2012. If the organization did not check a box on line 13, 16a, 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check thi									
	Explain in Part IV how the organization	on meets the '	facts-and-circum	nstances" test.	The organization	n qualifies as a	publicly		
	supported organization								
18	Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions								
	instructions						90 or 990-EZ) 2013		

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### Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

	· · · · · · · · · · · · · · · · · · ·			· ' '	<del>'</del>	<u> </u>		·····
<u>Sect</u>	tion A. Public Support		1	1		,		N/A
Caler	ndar year (or fiscal year beginning in) 🕨	(a) 2009	<b>(b)</b> 2010	(c) 2011	(d) 2012	(e) 2	013	(f) Total
1	Gifts, grants, contributions, and membership fees					1		
	received (Do not include any "unusual grants ")					1		
2	Gross receipts from admissions, merchandise					1		
	sold or services performed, or facilities			j	ļ			
	furnished in any activity that is related to the			!	į			
	organization's tax-exempt purpose							
3	Gross receipts from activities that are not an						1	
	unrelated trade or business under section 513							
4	Tax revenues levied for the							
	organization's benefit and either paid							
	to or expended on its behalf							
5	The value of services or facilities							
	furnished by a governmental unit to the		ļ			Į.		
	organization without charge							
6	Total. Add lines 1 through 5							_
7a	Amounts included on lines 1, 2, and 3		1	1				
	received from disqualified persons					<b>↓</b>		
b	Amounts included on lines 2 and 3							
	received from other than disqualified persons that exceed the greater of \$5,000							
	or 1% of the amount on line 13 for the year					ļ		
c	Add lines 7a and 7b							
8	Public support (Subtract line 7c from							
	line 6 )							
<u>Sect</u>	tion B. Total Support				<del></del>			
Caler	ndar year (or fiscal year beginning in) 🕨	(a) 2009	<b>(b)</b> 2010	(c) 2011	(d) 2012	(e) 2	013	(f) Total
9	Amounts from line 6					-		
10a	Gross income from interest, dividends, payments received on securities loans,							
	rents, royalties and income from similar						- 1	
	sources							
Ь	Unrelated business taxable income (less							
	section 511 taxes) from businesses							
	acquired after June 30, 1975					ļ		
C	Add lines 10a and 10b			<u> </u>		<del> </del>		
11	Net income from unrelated business		•			İ		
	activities not included in line 10b, whether or not the business is regularly				i			
	carried on · · · · · · · · · · · · · · · · · ·					<u> </u>		
12	Other income Do not include gain or					1	1	
	loss from the sale of capital assets							
	(Explain in Part IV)		<u></u>			<del> </del>		
13	Total support (Add lines 9, 10c, 11,							
	and 12)		<u> </u>				i	
14	First five years. If the Form 990 is for	the organizatio	n's first, second,	third, fourth, o	r fifth tax year	as a sect	ion 501(	c)(3)
	organization, check this box and stop here							▶
Sect	tion C. Computation of Public Sup							
15	Public support percentage for 2013 (line 8,					15		%
16	Public support percentage from 2012 Sched					16		<u>%</u>
Sect	tion D. Computation of Investmen			_				
17	Investment income percentage for 2013 (lin							<u>%</u>
18	Investment income percentage from 2012							%_
19a	331/3% support tests - 2013 If the org							
	17 is not more than 331/3%, check th							
b	331/3% support tests - 2012. If the orga							
	line 18 is not more than 331/3%, check							
20	Private foundation. If the organization	did not check	a box on line	14, 19a, or 19				
JSA						Schedule 🖊	۶ (Form 99)	30 or 990-EZ) 201:

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Part IV Supplemental Information. Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; and Part III, line 12. Also complete this part for any additional information. (See instructions).

SCHEDULE A, PART I (h) - INFORMATION ABOUT SUPPORTED ORGANIZATIONS

NAME OF SUPPORTED ORGANIZATION:

REAM

EIN: 04-2428942

TYPE OF ORGANIZATION FROM PART I: 501(c)3

IS THE ORGANIZATION LISTED IN GOVERNING DOCUMENT?: YES

DID YOU NOTIFY THE ORGANIZATION OF YOUR SUPPORT?: YES

IS THE ORGANIZATION ORGANIZED IN THE U.S.?: YES

TOTAL SUPPORT:

NONE

#### **SCHEDULE O** (Form 990 or 990-EZ)

### Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.

OMB No 1545-0047

Department of the Treasury Internal Revenue Service Name of the organization

▶ Attach to Form 990 or 990-EZ. Information about Schedule O (Form 990 or 990-EZ) and its instructions is at www irs gov/form990 Open to Public Inspection

Employer identification number

EDITH STEWART CHASE FOUNDATION - AGENCY	04-3242344
FORM 990, PAGE 6, PART VI, LINE 11-DESCRIPTION OF PROCESS FOR REV	IEW
Comparison of trust and checking account statements against	return
	~~~~~~~

Schedule O (Form 990 or 990-EZ) 2013 Page **2** 

Name of the organization

EDITH STEWART CHASE FOUNDATION - AGENCY

Employer identification number 04-3242344

FORM 990, PART I - ORGANIZATION'S PRIMARY EXEMPT PURPOSE

TO ASSIST RETIRED MEMBERS OF THE RETIRED EDUCATORS ASSOCIATION OF MASSACHUSETTS (REAM) WHO ARE IN NEED OF ASSISTANCE ON A TEMPORARY BASIS.