



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



Return of Private Foundation

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 THE ALCHEMY FOUNDATION		A Employer identification number 04-3541830
Number and street (or P.O. box number if mail is not delivered to street address) 104 LAKEVIEW AVE		B Telephone number (617) 731-6727
City or town, state or province, country, and ZIP or foreign postal code CAMBRIDGE, MA 02138		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <div style="display: flex; justify-content: space-between;"> <div> <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change </div> <div> <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change </div> </div>		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) \$ 3,152,700.	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	
(Part I, column (d) must be on cash basis.)		

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)	(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	0.		N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	54,064.	54,064.		STATEMENT 1
5a Gross rents	<2.>	<2.>		STATEMENT 2
b Net rental income or (loss)	<2.>			
6a Net gain or (loss) from sale of assets not on line 10	60,250.			
b Gross sales price for all assets on line 6a	517,184.			
7 Capital gain net income (from Part IV, line 2)		60,250.		
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	99,573.	99,573.		STATEMENT 3
12 Total. Add lines 1 through 11	213,885.	213,885.		
13 Compensation of officers, directors, trustees, etc.	0.	0.		0.
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees				
b Accounting fees STMT 4	5,339.	5,339.		0.
c Other professional fees STMT 5	1,917.	1,917.		0.
17 Interest				
18 Taxes STMT 6	165.	165.		0.
19 Depreciation and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses STMT 7	39,191.	37,720.		0.
24 Total operating and administrative expenses. Add lines 13 through 23	46,612.	45,141.		0.
25 Contributions, gifts, grants paid	730,164.			730,164.
26 Total expenses and disbursements. Add lines 24 and 25	776,776.	45,141.		730,164.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	<562,891.>			
b Net investment income (if negative, enter -0-)		168,744.		
c Adjusted net income (if negative, enter -0-)			N/A	

P
1

Part II Balance Sheets		Beginning of year	End of year	
			(a) Book Value	(b) Book Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	204,715.	229,956.	229,956.
	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			
	b Investments - corporate stock			
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶ Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 8	2,859,585.	2,272,230.	2,922,663.
	14 Land, buildings, and equipment: basis ▶ Less accumulated depreciation ▶			
Liabilities	15 Other assets (describe ▶ DIVIDEND RECEIVABLE)	858.	81.	81.
	16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)	3,065,158.	2,502,267.	3,152,700.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> 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 ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31			
	27 Capital stock, trust principal, or current funds	7,289,899.	7,289,899.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	<4,224,741.>	<4,787,632.>	
	30 Total net assets or fund balances	3,065,158.	2,502,267.	
	31 Total liabilities and net assets/fund balances	3,065,158.	2,502,267.	

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	3,065,158.
2 Enter amount from Part I, line 27a	2	<562,891.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	2,502,267.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	2,502,267.

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 GOLDMAN SACHS	P	VARIOUS	VARIOUS
b GOLDMAN SACHS	P	VARIOUS	VARIOUS
c ALTNERATIVE INVESTMENTS OPPORTUNITY	P	VARIOUS	VARIOUS
d ALTNERATIVE INVESTMENTS OPPORTUNITY	P	VARIOUS	VARIOUS
e ALTNERATIVE INVESTMENTS OPPORTUNITY	P	VARIOUS	VARIOUS

(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 242,717.		240,000.	2,717.
b 264,123.		216,773.	47,350.
c		143.	<143.>
d 10,344.			10,344.
e		18.	<18.>

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			2,717.
b			47,350.
c			<143.>
d			10,344.
e			<18.>

2 Capital gain net income or (net capital loss)	<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; border-right: 1px solid black; padding: 0 5px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div> <div style="margin-left: 10px;"> 2 60,250. </div> </div>
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	<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; border-right: 1px solid black; padding: 0 5px;"> If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 </div> <div style="margin-left: 10px;"> 3 N/A </div> </div>

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	685,393.	3,870,499.	.177081
2011	704,130.	3,623,937.	.194300
2010	321,976.	3,690,429.	.087246
2009	376,815.	3,805,976.	.099006
2008	458,940.	4,754,412.	.096529

2 Total of line 1, column (d)	2 .654162
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 .130832
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4 3,321,736.
5 Multiply line 4 by line 3	5 434,589.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6 1,687.
7 Add lines 5 and 6	7 436,276.
8 Enter qualifying distributions from Part XII, line 4	8 730,164.

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	1,687.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0.
3	Add lines 1 and 2	3	1,687.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	1,687.
6	Credits/Payments:		
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	4,958.
b	Exempt foreign organizations - tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	4,958.
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	3,271.
11	Enter the amount of line 10 to be: Credited to 2014 estimated tax <input checked="" type="checkbox"/> Refunded <input type="checkbox"/>	11	0.

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input 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

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► JEAN & KYRA MONTAGU Telephone no. ► (617) 731-6727 Located at ► 104 LAKEVIEW AVE, CAMBRIDGE, MA ZIP+4 ► 02138			
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? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes	No X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	1b
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 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? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?		4b X

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

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

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

☐ Yes ☒ No

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

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

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

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

6b

X

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

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

N/A

7b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
KYRA MONTAGU	TRUSTEE			
104 LAKEVIEW AVE				
CAMBRIDGE, MA 02138	1.00	0.	0.	0.
JEAN MONTAGU	TRUSTEE			
104 LAKEVIEW AVE				
CAMBRIDGE, MA 02138	0.25	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

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

[illegible]

Total number of others receiving over \$50,000 for professional services

0

Part IX-A Summary of Direct Charitable Activities	
--	--

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

Expenses

1	N/A	
2		
3		
4		

Part IX-B	Summary of Program-Related Investments
------------------	---

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

Amount

1	N/A	
2		
3	All other program-related investments. See instructions.	

Total. Add lines 1 through 3

0.

Part X**Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	3,156,831.
b	Average of monthly cash balances	1b	215,369.
c	Fair market value of all other assets	1c	121.
d	Total (add lines 1a, b, and c)	1d	3,372,321.
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	3,372,321.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	50,585.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3,321,736.
6	Minimum investment return. Enter 5% of line 5	6	166,087.

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	166,087.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	1,687.
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b	567.
c	Add lines 2a and 2b	2c	2,254.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	163,833.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	163,833.
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	163,833.

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	730,164.
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	730,164.
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	1,687.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	728,477.
Note The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.			

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				163,833.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2013:				
a From 2008	223,705.			
b From 2009	186,516.			
c From 2010	139,743.			
d From 2011	531,803.			
e From 2012	493,522.			
f Total of lines 3a through e	1,575,289.			
4 Qualifying distributions for 2013 from Part XII, line 4: ▶ \$	730,164.			
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				163,833.
e Remaining amount distributed out of corpus	566,331.			
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:	2,141,620.			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
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	223,705.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	1,917,915.			
10 Analysis of line 9:				
a Excess from 2009	186,516.			
b Excess from 2010	139,743.			
c Excess from 2011	531,803.			
d Excess from 2012	493,522.			
e Excess from 2013	566,331.			

N/A

- 1

☐ 4942(j)(3) or ☐ 4942(j)(5)

- [illegible]

Form **990-PF** (2013)

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 SCHEDULE A ATTACHED				730,164.
Total			▶ 3a	730,164.
b Approved for future payment NONE				
Total			▶ 3b	0.

Part XVII

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

- | | | | |
|----------|---|--------------|-----------|
| 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? | Yes | No |
| | | | |
| 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.

Signature of officer or trustee

Date: / /

Title

May the IRS discuss this return with the preparer

☒ Yes ☐ No

**Paid
Preparer
Use Only**

Print/Type preparer's name

Preparer's signature

Date _____

Check ☐ self-employed

PTIN

STEPHEN COLELLA

Stuck A Cal

11/10/14

P00538283

Firm's name ► DICICCO, GULMAN & COMPANY, LLP

Firm's EIN ► 04-3296226

Firm's address ► 150 PRESIDENTIAL WAY, SUITE 510
WOBURN, MA 01801

Phone no. 781-937-5300

The Alchemy Foundation		
EIN 04-3541830		
Attachment - Schedule A		
Date	Payee	Amount
01/28/2013	Boston Arts Academy	2,500 00
01/28/2013	Boston Women's Fund	150 00
01/28/2013	Community Supported Film	250 00
01/28/2013	Habitat For Humanity International	150 00
01/28/2013	IRC	20,000 00
01/28/2013	MIRA Coalition	5,000 00
01/28/2013	Museum Of Science	1,000 00
01/28/2013	Planned Parenthood League Of Mass	25,000 00
01/28/2013	Save Venice Inc	150 00
01/28/2013	USA for UNHCR	10,000 00
03/11/2013	Boston Arts Academy	2,500 00
03/18/2013	Aids Action Committee	1,000 00
03/18/2013	Associates Of The Boston Public Library	250 00
03/18/2013	Boston Landmarks Orchestra	2,000 00
03/18/2013	Boston Public Library Foundation	250 00
03/18/2013	Cambridge Center For Adult Education	1,000 00
03/18/2013	Decordova Museum & Sculpture Park	2,500 00
03/18/2013	Doctors Without Borders	5,000 00
03/18/2013	FINCA	250 00
03/18/2013	First Literacy	150 00
03/18/2013	Friends Of Boston's Homeless	500 00
03/18/2013	Friends of Cambridge Public Library	500 00
03/18/2013	Isabella Stewart Gardner Museum	5,000 00
03/18/2013	Mass College Of Art & Design Foundation	2,500 00
03/18/2013	Max Warburg Courage Curriculum, Inc	250 00
03/18/2013	Mercy Corps	5,000 00
03/18/2013	Metco	500 00
03/18/2013	Museum Of Fine Arts	5,000 00
03/18/2013	NAACP	100 00
03/18/2013	Northeast Wilderness Trust	100 00
03/18/2013	The Boston Athenaeum	320 00
03/18/2013	The Boston Athenaeum	2,000 00
03/18/2013	The Cambridge Arts Council Fund	250 00
03/18/2013	The Macdowell Colony	500 00
03/18/2013	The Philanthropy Connection	500 00
03/18/2013	Union of Concerned Scientists (UCS)	500 00
03/18/2013	Us Fund For Unicef	5,000 00
04/12/2013	Commonwealth Shakespeare Company	800 00
04/29/2013	ACLU	500 00
04/29/2013	Artists For Humanity	250 00
04/29/2013	Asylum Access	10,000 00
04/29/2013	Beacon Academy	10,000 00
04/29/2013	Boston Symphony Orchestra	5,000 00
04/29/2013	Charles River Conservancy	5,000 00
04/29/2013	Conservatory Lab Charter School	2,500 00
04/29/2013	Decordova Museum & Sculpture Park	2,500 00
04/29/2013	Facing History and Ourselves	500 00
04/29/2013	Institute Of Contemporary Art	1,500 00
04/29/2013	Isabella Stewart Gardner Museum	10,000 00
04/29/2013	Mass College Of Art & Design Foundation	5,000 00
04/29/2013	Neighborhood House Charter School	500 00
04/29/2013	Oxfam America	2,500 00
04/29/2013	Partners in Health	2,500 00
04/29/2013	Perkins School For The Blind	1,000 00
04/29/2013	Ploughshares Fund	5,000 00
04/29/2013	School Of The Museum Of Fine Arts	2,500 00

The Alchemy Foundation		
EIN 04-3541830		
Attachment - Schedule A		
04/29/2013	The Petra Foundation	5,000 00
04/29/2013	Wbur	5,000 00
06/05/2013	Community Cooks	250 00
06/20/2013	Addison Gallery Of American Art	350 00
06/20/2013	American Repertory Theater	250 00
06/20/2013	Amnesty International	5,000 00
06/20/2013	BalletRox	100 00
06/20/2013	Boston Architectual College	250 00
06/20/2013	Boston Childrens Museum	20,000 00
06/20/2013	Boston Childrens Museum	5,000 00
06/20/2013	Boston Childrens Museum	25,000 00
06/20/2013	Brookline Community Mental Health Center	500 00
06/20/2013	Brookline Community Mental Health Center	500 00
06/20/2013	Cambridge Plant & Garden Club	200 00
06/20/2013	Central Square Theater	500 00
06/20/2013	Citizen Schools	1,000 00
06/20/2013	Crwa	200 00
06/20/2013	Emerald Necklace Conservancy	250 00
06/20/2013	Friends Of Mt Auburn Cemetery	1,000 00
06/20/2013	Haymarket People's Fund	250 00
06/20/2013	Human Rights Watch	500 00
06/20/2013	Huntington Theatre Company	500 00
06/20/2013	IPPF/WHR	250 00
06/20/2013	Mass Audubon	150 00
06/20/2013	Maud Morgan Art Center	500 00
06/20/2013	MIRA Coalition	1,000 00
06/20/2013	Monadnock Music	500 00
06/20/2013	National Parks Conservation Assoc, NPCA	100 00
06/20/2013	National Trust For Historic Preservation	100 00
06/20/2013	One Fund Boston, Inc	1,000 00
06/20/2013	Outside the Box	250 00
06/20/2013	Peterborough Players	350 00
06/20/2013	Playwrights' Workshop	1,000 00
06/20/2013	Project Step	520 00
06/20/2013	Rogerson Communities, Inc	1,000 00
06/20/2013	Shared Interest	100 00
06/20/2013	Simmons College	1,899 00
06/20/2013	The Boston Committee of The GCA	100 00
06/20/2013	The Family Center	500 00
06/20/2013	The Macdowell Colony	1,000 00
06/20/2013	WGBH	3,500 00
09/16/2013	American Red Cross	200 00
09/16/2013	Arnold Arboretum Of Harvard University	200 00
09/16/2013	Associates Of The Boston Public Library	100 00
09/16/2013	Associates Of The Boston Public Library	100 00
09/16/2013	Bishop Strachan School, Inc	150 00
09/16/2013	Boston Landmarks Orchestra	250 00
09/16/2013	Boston Women's Fund	250 00
09/16/2013	Canadian Art Foundation	100 00
09/16/2013	CARE	200 00
09/16/2013	Cultural Survival	150 00
09/16/2013	EARTHJUSTICE	100 00
09/16/2013	First Literacy	100 00
09/16/2013	Fuller Craft Museum	1,000 00
09/16/2013	Garden of Peace	100 00
09/16/2013	Greater Boston Food Bank	1,000 00
09/16/2013	Harvard College Fund	250 00

The Alchemy Foundation		
EIN 04-3541830		
Attachment - Schedule A		
09/16/2013	Ippnw	1,000 00
09/16/2013	Marion Institute	250 00
09/16/2013	Neighborhood House Charter School	1,500 00
09/16/2013	New England International Donors	1,000 00
09/16/2013	On The Rise	500 00
09/16/2013	Peabody Essex Museum	350 00
09/16/2013	Physicians For Human Rights	2,000 00
09/16/2013	Population Connection	500 00
09/16/2013	RefugePoint - Mapendo International	25,000 00
09/16/2013	Sharon Arts Center	200 00
09/16/2013	St Boniface Haiti Foundation	1,000 00
09/16/2013	The Cantata Singers	250 00
09/16/2013	The Nature Conservancy	1,000 00
09/16/2013	Thursday Morning Talks	350 00
09/16/2013	Trustees Of Reservations	250 00
10/01/2013	Accion	200 00
10/01/2013	American Cancer Society	100 00
10/01/2013	American Friends Service Committee	200 00
10/01/2013	Artists For Humanity	250 00
10/01/2013	Ashoka Innovators for the Public	1,000 00
10/01/2013	Ballets Russes	200 00
10/01/2013	Cambridge Center For Adult Education	1,000 00
10/01/2013	Career Collaborative Inc	250 00
10/01/2013	Community Cooks	100 00
10/01/2013	Coolidge Corner Theatre Foundation	250 00
10/01/2013	Cooperative Artists Institute	500 00
10/01/2013	Crittenton Women's Union	350 00
10/01/2013	Dana-Farber Cancer Institute	100 00
10/01/2013	Danforth Museum Of Art	1,000 00
10/01/2013	Doctors Without Borders	5,000 00
10/01/2013	Emmanuel Music	200 00
10/01/2013	Harvard University Art Museums	2,000 00
10/01/2013	Heifer International	500 00
10/01/2013	Indian Hill Music	250 00
10/01/2013	International Institute Of New England	1,500 00
10/01/2013	IPPF/WHR	250 00
10/01/2013	King's Chapel Concert Series	100 00
10/01/2013	Maud Morgan Art Center	1,500 00
10/01/2013	Mercy Corps	500 00
10/01/2013	New England Conservatory	500 00
10/01/2013	NRDC	2,500 00
10/01/2013	Pine Steet Inn	1,000 00
10/01/2013	Planned Parenthood Federation Of America	0 00
10/01/2013	Prospect Sierra School	1,500 00
10/01/2013	Radcliffe Institute for Advanced Study	250 00
10/01/2013	Rosie's Place	1,500 00
10/01/2013	Sierra Club	400 00
10/01/2013	South Africa Partners	200 00
10/01/2013	The Fund for Brigham and Women's Hospital	150 00
10/01/2013	The Home for Little Wanderers	150 00
10/01/2013	Union of Concerned Scientists (UCS)	500 00
10/01/2013	Walnut Hill School for the Arts	250 00
10/01/2013	Whitehead Institute	1,500 00
10/31/2013	Planned Parenthood League Of Mass	1,000 00
11/12/2013	Mercy Corps	5,000 00
11/25/2013	American Repertory Theater	5,000 00
11/25/2013	Austen Riggs Center	100 00

The Alchemy Foundation		
EIN 04-3541830		
Attachment - Schedule A		
11/25/2013	Cambridge Plant & Garden Club	100 00
11/25/2013	Community Change, Inc	100 00
11/25/2013	Conservation Law Foundation	150 00
11/25/2013	Harris Center for Conservation Education	100 00
11/25/2013	Indian Law Resource Center	100 00
11/25/2013	IRC	10,000 00
11/25/2013	KickStart	2,500 00
11/25/2013	Moma	100 00
11/25/2013	Mount Desert Land & Garden Preserve	50 00
11/25/2013	Mspcc	200 00
11/25/2013	Primary Source	250 00
11/25/2013	Save The Children Federation	5,000 00
11/25/2013	Shakespeare & Co	100 00
11/25/2013	Somerville-Cambridge Elder Services	100 00
11/25/2013	St Botolph Club Foundation	250 00
11/25/2013	The Art Connection	500 00
11/25/2013	The Boston Athenaeum	2,500 00
11/25/2013	The Food Project	250 00
11/25/2013	The Society Of Arts & Crafts	250 00
11/25/2013	USA for UNHCR	10,000 00
12/11/2013	Walter & Duncan Gordon Chanty	335,000 00
12/16/2013	Boston Arts Academy	500 00
12/16/2013	CanngBndge	50 00
12/16/2013	Community Supported Film	100 00
12/16/2013	Facing History and Ourselves	250 00
12/16/2013	Family Service Of Greater Boston	250 00
12/16/2013	FINCA	250 00
12/16/2013	Frends of the Old Burying Ground	200 00
12/16/2013	Girls, Inc	250 00
12/16/2013	Hearth	400 00
12/16/2013	Huntington Theatre Company	500 00
12/16/2013	Massachusetts Coalition for the Homeless	25 00
12/16/2013	Massachusetts Housing & Shelter Alliance	100 00
12/16/2013	Mits, Inc	250 00
12/16/2013	NAMI	250 00
12/16/2013	National Park Foundation	50 00
12/16/2013	NOW Foundation	50 00
12/16/2013	Oxfam Amenca	1,000 00
12/16/2013	Partners in Health	1,000 00
12/16/2013	Perkins School For The Blind	500 00
12/16/2013	Planned Parenthood League Of Mass	1,000 00
12/16/2013	Playworks	200 00
12/16/2013	Ploughshares Fund	2,500 00
12/16/2013	Public Conversations Project	100 00
12/16/2013	Royall House and Slave Quarters	50 00
12/16/2013	Solutions At Work	200 00
12/16/2013	South End Community Health Center	750 00
12/16/2013	Us Fund For Unicef	2,000 00
12/16/2013	Women's Lunch Place	1,000 00
12/21/2013	Iraqi Refugee Assistance Project	10,000 00
		730,164 00

Application for Extension of Time To File an Exempt Organization Return

OMB No 1545-1709

Department of the Treasury
Internal Revenue Service

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

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

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

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

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

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

Part I only

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

Enter filer's identifying number

Type or print	Name of exempt organization or other filer, see instructions	Employer identification number (EIN) or
	THE ALCHEMY FOUNDATION	04-3541830
File by the due date for filing your return. See instructions	Number, street, and room or suite no. If a P O box, see instructions	Social security number (SSN)
	104 LAKEVIEW AVE	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	CAMBRIDGE, MA 02138	

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

04

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

JEAN & KYRA MONTAGU

- The books are in the care of ► 104 LAKEVIEW AVE - CAMBRIDGE, MA 02138

Telephone No ► (617) 731-6727

Fax No ►

- If the organization does not have an office or place of business in the United States, check this box ☐

- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____ If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

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

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

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	3a	\$	1,191.
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit	3b	\$	4,958.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	3c	\$	0.

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

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **X**
- Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.
- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1)

Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed)

Enter filer's identifying number, see instructions

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions	Employer identification number (EIN) or
	THE ALCHEMY FOUNDATION	04-3541830
	Number, street, and room or suite no. If a P.O. box, see instructions	Social security number (SSN)
	104 LAKEVIEW AVE	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions	
	CAMBRIDGE, MA 02138	

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

04

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01		
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

JEAN & KYRA MONTAGU

- The books are in the care of ☒ 104 LAKEVIEW AVE - CAMBRIDGE, MA 02138

Telephone No ☒ (617) 731-6727Fax No ☐

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____ If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

4 I request an additional 3-month extension of time until NOVEMBER 15, 20145 For calendar year 2013, or other tax year beginning _____, and ending _____6 If the tax year entered in line 5 is for less than 12 months, check reason ☐ Initial return ☐ Final return☐ Change in accounting period

7 State in detail why you need the extension

ADDITIONAL TIME AND INFORMATION IS REQUIRED TO FILE A COMPLETE AND ACCURATE TAX RETURN.

8a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	8a	\$	1,692.
8b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868	8b	\$	4,958.
8c Balance due. Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	8c	\$	0.

Signature and Verification must be completed for Part II only.

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature ☒ John A. Clark Title ☒ CPADate ☒ 8/4/14

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
-------------	--	-----------	---

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
ALTERNATIVE INVESTMENTS INSTITUTIONAL	21,996.	0.	21,996.	21,996.	
ALTERNATIVE INVESTMENTS OPPORTUNITY	26,642.	0.	26,642.	26,642.	
GOLDMAN SACHS	6,083.	0.	6,083.	6,083.	
LESS: GOLDMAN SACHS BOND PREMIUM AMORTIZATION	<657.>	0.	<657.>	<657.>	
TO PART I, LINE 4	54,064.	0.	54,064.	54,064.	

FORM 990-PF	RENTAL INCOME	STATEMENT	2
-------------	---------------	-----------	---

KIND AND LOCATION OF PROPERTY	ACTIVITY NUMBER	GROSS RENTAL INCOME
	1	<2.>
TOTAL TO FORM 990-PF, PART I, LINE 5A		<2.>

FORM 990-PF	OTHER INCOME	STATEMENT	3
-------------	--------------	-----------	---

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
OTHER INCOME	86,881.	86,881.	
ORDINARY INCOME FROM ALT INV OPP K-1	12,692.	12,692.	
TOTAL TO FORM 990-PF, PART I, LINE 11	99,573.	99,573.	

FORM 990-PF	ACCOUNTING FEES	STATEMENT	4
-------------	-----------------	-----------	---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	3,445.	3,445.		0.
BOOKKEEPING	1,894.	1,894.		0.
TO FORM 990-PF, PG 1, LN 16B	5,339.	5,339.		0.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	5
-------------	-------------------------	-----------	---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
CONSULTING ON GRANTS	0.	0.		0.
INVESTMENT MANAGEMENT FEES	1,917.	1,917.		0.
TO FORM 990-PF, PG 1, LN 16C	1,917.	1,917.		0.

FORM 990-PF	TAXES	STATEMENT	6
-------------	-------	-----------	---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
STATE FILING FEES	70.	70.		0.
FOREIGN TAXES	95.	95.		0.
TO FORM 990-PF, PG 1, LN 18	165.	165.		0.

FORM 990-PF	OTHER EXPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ALTERNATIVE INVESTMENTS					
INSTITUTIONAL, LP	16,076.	16,076.			0.
BANK FEES	20.	20.			0.
MISCELLANEOUS EXPENSES	1,471.	0.			0.
ALTERNATIVE INVESTMENTS					
OPPORTUNITY, LP	17,869.	17,869.			0.
INVESTMENT INTEREST EXPENSE	3,755.	3,755.			0.
TO FORM 990-PF, PG 1, LN 23	39,191.	37,720.			0.

FORM 990-PF	OTHER INVESTMENTS		STATEMENT	8
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE	
ALTERNATIVE INVESTMENTS K-1S	COST	2,272,230.	2,922,663.	
GOLDMAN, SACHS & CO.	COST	0.	0.	
TOTAL TO FORM 990-PF, PART II, LINE 13		2,272,230.	2,922,663.	

FORM 990-PF	PART XV - LINE 1A LIST OF FOUNDATION MANAGERS	STATEMENT	9
-------------	--	-----------	---

NAME OF MANAGER

KYRA MONTAGU
JEAN MONTAGU