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Return of Private Foundation

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

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

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning

, and ending

Name of foundation STODDARD CHARITABLE TRUST		A Employer identification number 04-6023791
Number and street (or P.O. box number if mail is not delivered to street address) 370 MAIN STREET 12TH FLOOR		B Telephone number 508-459-8000
City or town, state or province, country, and ZIP or foreign postal code WORCESTER, MA 01608-1779		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1 Foreign organizations, check here ☐ 2 Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization: ☐ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☒ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 86,778,827. (Part I, column (d) must be on cash basis.)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

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				N/A	
2 Check ☒ if the foundation is not required to attach Sch. B Interest on savings and temporary cash investments		142.	2.		
3 Dividends and interest from securities		2,719,224.	2,621,535.		STATEMENT 1 STATEMENT 2
4a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		487,379.			
b Gross sales price for all assets on line 6a		27,330,123.			
7 Capital gain net income (from Part IV, line 2)			487,379.		
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		<120,313.>	4,018.		STATEMENT 3
12 Total. Add lines 1 through 11		3,086,432.	3,112,934.		
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		350,000.	175,000.		175,000.
c Other professional fees STMT 5		68,754.	34,377.		34,377.
17 Interest		24,193.	24,193.		0.
18 Taxes STMT 6		111,428.	0.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 7		237,538.	4,104.		3,181.
24 Total operating and administrative expenses. Add lines 13 through 23		791,913.	237,674.		212,558.
25 Contributions, gifts, grants paid		4,139,853.			4,139,853.
26 Total expenses and disbursements. Add lines 24 and 25		4,931,766.	237,674.		4,352,411.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<1,845,334.>			
b Net investment income (if negative, enter -0-)			2,875,260.		
c Adjusted net income (if negative, enter -0-)				N/A	

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1 Cash - non-interest-bearing					
	2 Savings and temporary cash investments			964,762.	1,965,249.	1,965,249.
	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 STMT 8			38,867,298.	35,781,308.	59,091,449.
	c Investments - corporate bonds STMT 9			903,413.	901,945.	952,696.
	Liabilities	11 Investments - land, buildings, and equipment basis ▶				
Less accumulated depreciation ▶						
12 Investments - mortgage loans						
13 Investments - other STMT 10				20,306,658.	21,202,650.	24,508,283.
14 Land, buildings, and equipment basis ▶						
Less accumulated depreciation ▶						
15 Other assets (describe ▶ STATEMENT 11)				915,505.	261,150.	261,150.
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)				61,957,636.	60,112,302.	86,778,827.
17 Accounts payable and accrued expenses						
18 Grants payable						
Net Assets or Fund Balances	19 Deferred revenue					
	20 Loans from officers, directors, trustees, and other disqualified persons					
	21 Mortgages and other notes payable					
	22 Other liabilities (describe ▶)					
23 Total liabilities (add lines 17 through 22)			0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐					
	24 Unrestricted					
	25 Temporarily restricted					
	26 Permanently restricted					
	Foundations that do not follow SFAS 117, check here ▶ ☒					
	27 Capital stock, trust principal, or current funds			0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds			61,957,636.	60,112,302.	
30 Total net assets or fund balances			61,957,636.	60,112,302.		
31 Total liabilities and net assets/fund balances			61,957,636.	60,112,302.		

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	61,957,636.
2 Enter amount from Part I, line 27a	2	<1,845,334.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	60,112,302.
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	60,112,302.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a			
b SEE ATTACHED STATEMENT			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e 27,330,123.		26,885,113.	487,379.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			487,379.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	487,379.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8	3	N/A

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2012	4,071,765.	77,830,330.	.052316
2011	4,047,121.	75,939,532.	.053294
2010	3,156,001.	69,823,455.	.045200
2009	2,755,893.	59,448,395.	.046358
2008	3,659,273.	74,369,615.	.049204

2 Total of line 1, column (d)	2	.246372
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	.049274
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	83,703,253.
5 Multiply line 4 by line 3	5	4,124,394.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	28,753.
7 Add lines 5 and 6	7	4,153,147.
8 Enter qualifying distributions from Part XII, line 4	8	4,352,411.

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 ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	28,753.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		3	28,753.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
3 Add lines 1 and 2		5	28,753.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	38,280.	
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	38,280.	
8 Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	9,527.	
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax ☐ Refunded ☒	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
b 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
c 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. ☐ \$ 0. (2) On foundation managers. ☐ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ☐ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? 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) ☐ 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 ► FLETCHER TILTON PC Telephone no. ► (508) 459-8000 Located at ► 370 MAIN STREET 12TH FLOOR, WORCESTER, MA ZIP+4 ► 01608-1779			
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?	☐ Yes ☒ No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☒ Yes ☐ No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ► ☐	1b	X
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 ► , , ,	☐ Yes ☒ 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	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► , , ,	2b	
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No	
b If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b	X

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

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?

If "Yes" to 6b, file Form 8870

☐ Yes ☒ No

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

N/A

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

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
WARNER S. FLETCHER 11 MONMOUTH ROAD WORCESTER, MA 01606	CHAIRMAN/TTEE 10.00	0.	0.	0.
ALLEN W. FLETCHER 53 ELM STREET WORCESTER, MA 01608	TRUSTEE 1.00	0.	0.	0.
JUDITH S. KING 140 MAIN STREET SOUTHBORO, MA 01772	TREAS/TTEE 1.00	0.	0.	0.
VALERIE S. LORING 16 MILITARY ROAD WORCESTER, MA 01609	SEC/TTEE 1.00	0.	0.	0.

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

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

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

0

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Part VIII**Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
FLETCHER TILTON PC 370 MAIN ST. 12TH FLOOR, WORCESTER, MA 01608	TRUST & ACCOUNTING FEES	350,000.
NIXON PEABODY 370 MAIN ST. 12TH FLOOR, WORCESTER, MA 01608	TRUST & ACCOUNTING FEES	68,754.
Total number of others receiving over \$50,000 for professional services		0

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

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

	Expenses
1 N/A	
2	
3	
4	

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

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

	Amount
1 N/A	
2	
All other program-related investments. See instructions	
3	
Total. Add lines 1 through 3	0.

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	83,432,617.
b	Average of monthly cash balances	1b	1,545,305.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	84,977,922.
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	84,977,922.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	1,274,669.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	83,703,253.
6	Minimum investment return. Enter 5% of line 5	6	4,185,163.

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	4,185,163.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	28,753.
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	28,753.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	4,156,410.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	4,156,410.
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	4,156,410.

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	4,352,411.
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	4,352,411.
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	28,753.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	4,323,658.

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				4,156,410.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			216,488.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2013.				
a From 2008				
b From 2009				
c From 2010				
d From 2011				
e From 2012				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2013 from Part XII, line 4: ► \$ 4,352,411.				
a Applied to 2012, but not more than line 2a			216,488.	
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				4,135,923.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				20,487.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2014 Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
d Excess from 2012				
e Excess from 2013				

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				
ALLIANCE BERNSTEIN HOLDING 1345 AVENUE OF THE AMERICA'S NEW YORK, NY 10105	NONE		K-1 CHARITABLE PARTNERSHIP	74.
ALLIANCE RESOURCE PARTNERS P.O. BOX 22027 TULSA, OK 74121-2027	NONE		K-1 CHARITABLE PARTNERSHIP	183.
ENERGY TRANSFER PARTNERS 3738 OAK LAWN DALLAS, TX 75219	NONE		K-1 CHARITABLE PARTNERSHIP	15.
NATURAL RESOURCE PARTNERS 601 JEFFERSON STREET, SUITE 3600 HOUSTON, TX 77002	NONE		K-1 CHARITABLE PARTNERSHIP	62.
REGENCY ENERGY PARTNERS 2001 BRYAN STREET, STE 3700 DALLAS, TX 75201	NONE		K-1 CHARITABLE PARTNERSHIP	17.
Total	SEE CONTINUATION SHEET(S)			4,139,853.
b Approved for future payment				
SEE ATTACHED LIST	NONE	PUBLIC	VARIOUS	2,860,000.
Total				2,860,000.

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 FTW & CO - ST COVERED	P		
b FTW & CO - LT COVERED	P		
c FTW & CO - ST NON COVERED	P		
d FTW & CO - LT NON COVERED	P		
e K-1'S REALIZED GAIN/LOSS	P		
f K-1'S - SECTION 1231 GAIN			
g CAPITAL GAINS DIVIDENDS			
h			
i			
j			
k			
l			
m			
n			
o			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 20,770,919.		20,381,697.	389,222.
b 1,695,591.		1,840,767.	<145,176.>
c 164,475.		164,002.	473.
d 4,555,092.		4,498,647.	56,445.
e			21,363.
f			21,006.
g 144,046.			144,046.
h			
i			
j			
k			
l			
m			
n			
o			

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

(i) 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) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			389,222.
b			<145,176.>
c			473.
d			56,445.
e			21,363.
f			21,006.
g			144,046.
h			
i			
j			
k			
l			
m			
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	487,379.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8	3	N/A

04-6023791

3 Grants and Contributions Paid During the Year (Continuation)

323631
05-01-13

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

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
FTW&CO - TAX EXEMPT	140.	0.	
FTW&CO - US OBL INT	2.	2.	
TOTAL TO PART I, LINE 3	142.	2.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
FTW&CO - CORP INTEREST	44,132.	0.	44,132.	44,132.	
K-1 DIVIDENDS	27,649.	0.	27,649.	27,649.	
K-1 INTEREST	47,901.	0.	47,901.	47,901.	
NP CAPITAL GAIN DIV	144,046.	144,046.	0.	0.	
NP DIVIDENDS	2,501,853.	0.	2,501,853.	2,501,853.	
NP NON TAXABLE DIVIDENDS	97,689.	0.	97,689.	0.	
TO PART I, LINE 4	2,863,270.	144,046.	2,719,224.	2,621,535.	

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
K-1 ROYALTIES	2,991.	2,991.	
K-1 OTHER PORTFOLIO INCOME	1,027.	1,027.	
PARTNERSHIP K-1 ORDINARY LOSS	<124,331.>	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	<120,313.>	4,018.	

FORM 990-PF	ACCOUNTING FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FLETCHER TILTON PC	350,000.	175,000.		175,000.
TO FORM 990-PF, PG 1, LN 16B	350,000.	175,000.		175,000.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
NIXON PEABODY	68,754.	34,377.		34,377.
TO FORM 990-PF, PG 1, LN 16C	68,754.	34,377.		34,377.

FORM 990-PF	TAXES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAX WITHHELD	56,531.	0.		0.
US TREASURY PYMTS	50,068.	0.		0.
FOREIGN TAX WITHHELD - K-1'S	4,829.	0.		0.
TO FORM 990-PF, PG 1, LN 18	111,428.	0.		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
K-1 EXPENSES	221,431.	0.		0.
MICROEDGE FEE	1,537.	0.		1,537.
ADR TAX RECLAMATION FEE	4,104.	4,104.		0.
COMM OF MASS FILING FEE PC	500.	0.		500.
K-1 NON-DEDUCTIBLE EXPENSES	8,822.	0.		0.
MISCELLANEOUS EXPENSES OTHER	1,144.	0.		1,144.
TO FORM 990-PF, PG 1, LN 23	237,538.	4,104.		3,181.

FORM 990-PF

CORPORATE STOCK

STATEMENT 8

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
EQUITY STOCK	33,398,959.	56,474,320.
MUTUAL FUNDS	2,382,349.	2,617,129.
TOTAL TO FORM 990-PF, PART II, LINE 10B	35,781,308.	59,091,449.

FORM 990-PF

CORPORATE BONDS

STATEMENT 9

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS	901,945.	952,696.
TOTAL TO FORM 990-PF, PART II, LINE 10C	901,945.	952,696.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT 10
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
LIMITED PARTNERSHIPS	COST	3,703,044.	9,481,514.
PREFERRED STOCK	COST	17,499,606.	15,026,769.
TOTAL TO FORM 990-PF, PART II, LINE 13		21,202,650.	24,508,283.

FORM 990-PF	OTHER ASSETS	STATEMENT 11
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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
CAMBRIDGE SEMANTICS INC	200,000.	261,150.	261,150.
FIRST TIMOTHY FIVE THREE LC	715,505.	0.	0.
TO FORM 990-PF, PART II, LINE 15	915,505.	261,150.	261,150.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 12

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

WARNER S. FLETCHER 370 MAIN STREET 12TH FLOOR, WORCESTER, MA 01608

TELEPHONE NUMBER

508-459-8000

FORM AND CONTENT OF APPLICATIONS

APPLICATIONS SHOULD BE MADE BY LETTER SUBMITTED IN QUINTUPLICATE
SUMMARIZING A REQUEST, TOGETHER WITH BACKGROUND INFORMATION. INCLUDE A COPY
OF THE IRS TAX EXEMPTION LETTER.

ANY SUBMISSION DEADLINES

APPLICATIONS SHOULD BE RECEIVED TWO OR MORE WEEKS PRIOR TO ONE OF FIVE OR
SIX YEARLY DISTRIBUTION MEETINGS.

RESTRICTIONS AND LIMITATIONS ON AWARDS

GRANTS ARE AWARDED IN THE CULTURAL, EDUCATIONAL AND SOCIAL SERVICE NEED
AREAS PRIMARILY IN THE CITY OF WORCESTER.

Stoddard Payments 2013

11/11/2014

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
<u>Stoddard Charitable Trust</u>				
9th Massachusetts Battery <i>Historical Presentations</i> \$5,000 00	7313769	6/25/2013	\$5,000 00	
Abby's House <i>Heating System</i> \$19,000 00	7313767	6/25/2013	\$19,000 00	
Alameda County Community Food Bank <i>Santa Claus Grant</i> \$2,000 00	7314329	12/19/2013	\$2,000 00	
American Red Cross of Central Massachusetts <i>Disaster Relief Program</i> \$30,000 00	7314017	12/19/2013	\$30,000 00	
Anna Maria College <i>Library Renovations</i> \$400,000 00	5608363	8/1/2013	\$100,000 00	
Art in the Park (Arts & Business Council-Fiscal Agent) <i>2013 Art Event</i> \$2,000 00	7313735	6/25/2013	\$2,000 00	
Bancroft School <i>Santa Claus Grant</i> \$2,500 00	7314331	12/19/2013	\$2,500 00	
Bancroft School <i>Santa Claus Grant</i> \$9,000 00	7314293	12/20/2013	\$9,000 00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Bay Area Wilderness Training Santa Claus Grant \$2,000 00	7314325	12/19/2013	\$2,000 00	
Becker College Campus Center Construction \$375,000 00	5628630	8/1/2013	\$75,000 00	
Blackstone River Valley National Heritage Corridor Operating Support \$60,000 00	7313919	12/23/2013	\$25,000 00	
Blair Academy Santa Claus Grant \$2,000 00	7314330	12/19/2013	\$2,000 00	
Bottom Line (The) Success Program \$5,000 00	7313890	9/23/2013	\$5,000 00	
Boys and Girls Club of Worcester Wheels to Water \$10,000 00	7313947	9/23/2013	\$10,000 00	
Breakwater School Santa Claus Grant \$5,000 00	7314237	12/19/2013	\$5,000 00	
Breakwater School Santa Claus Grant \$2,500 00	7314238	12/19/2013	\$2,500 00	
Breakwater School Santa Claus Grant \$10,000 00	7314332	12/19/2013	\$10,000 00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Bridge of Central Massachusetts, Inc. <i>Technology Purchase</i> \$20,000 00	7313858	6/25/2013	\$20,000 00	
Camp Putnam of the Worcester Fresh Air Fund, Inc. <i>Aris & Crafts Center</i> \$10,000 00	7313666	4/2/2013	\$10,000 00	19852
Canal District Alliance <i>Canalfest 2013</i> \$5,000 00	7313691	6/25/2013	\$5,000 00	
Carlisle Charitable Foundation <i>Santa Claus Grant</i> \$5,000 00	7314334	12/19/2013	\$5,000 00	
CASA Project, Inc. (The) <i>2013 Support</i> \$20,000 00	7313850	6/25/2013	\$20,000 00	
CASA Project, Inc. (The) <i>Santa Claus Grant</i> \$5,000 00	7314239	12/19/2013	\$5,000 00	
Center for Living and Working, Inc. <i>Office Renovations</i> \$20,000 00	7314122	12/19/2013	\$20,000 00	
Children's Day School <i>Santa Claus Grant</i> \$10,000 00	7314333	12/19/2013	\$10,000 00	
Clark University <i>LEEP Initiative</i> \$650,000 00	6399784	12/19/2013	\$150,000 00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Clark University <i>LEEP Initiative</i> \$650,000 00	6399784	12/19/2013	\$150,000 00	
College of the Holy Cross aka Holy Cross <i>Santa Claus Grant</i> \$2,500 00	7314308	12/19/2013	\$2,500 00	
Community Harvest Project, Inc. <i>Equipment Purchases</i> \$20,000 00	7313648	4/2/2013	\$20,000 00	19855
Critical Exposure <i>Santa Claus Grant</i> \$5,000 00	7314335	12/19/2013	\$5,000 00	
Dartmouth College - School of Business <i>Santa Claus Grant</i> \$2,000 00	7314322	12/19/2013	\$2,000 00	
Dismas House of Massachusetts, Inc. <i>Capital Campaign</i> \$30,000 00	7313682	6/25/2013	\$30,000 00	
Dynamy, Inc. <i>Youth Academy</i> \$12,000 00	7314131	12/19/2013	\$12,000 00	
East Bay SPCA <i>Santa Claus Grant</i> \$1,000 00	7314336	12/19/2013	\$1,000 00	
The Edible Schoolyard Berkeley <i>Santa Claus Grant</i> \$1,000 00	7314337	12/19/2013	\$1,000 00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
First Night Worcester <i>First Night 2014</i> \$8,000 00	7313859	6/25/2013	\$8,000 00	
Friends of Wissahickon <i>Santa Claus Grant</i> \$1,000 00	7314326	12/19/2013	\$1,000 00	
Genesis Club, Inc. <i>Facility Acquisition</i> \$75,000 00	7313915	9/23/2013	\$75,000 00	
Girls Incorporated of Worcester <i>Assessment Costs</i> \$8,000 00	7313946	9/23/2013	\$8,000 00	
Girls Incorporated of Worcester <i>Wheels to Water</i> \$7,000 00	7313948	9/23/2013	\$7,000 00	
Girls Incorporated of Worcester <i>Caretaker House</i> \$40,000 00	7314123	12/19/2013	\$40,000 00	
Girls Incorporated of Worcester <i>Santa Claus Grant</i> \$5,000 00	7314240	12/19/2013	\$5,000 00	
Greater Worcester Community Foundation, Inc. <i>Santa Claus Grant</i> \$2,500 00	7314241	12/19/2013	\$2,500 00	
Greater Worcester Land Trust <i>Land Acquisition Fund</i> \$300,000 00	7313349	12/19/2013	\$150,000 00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Greater Worcester Land Trust <i>Santa Claus Grant</i> \$5,000 00	7314289	12/20/2013	\$5,000 00	
Guild of St. Agnes <i>Van Purchase</i> \$20,000 00	7313913	9/23/2013	\$20,000 00	
Habitat for Humanity MetroWest/Greater Worcester <i>College Hill</i> \$20,000 00	7314100	12/19/2013	\$20,000 00	
Holden Gale Free Library <i>Endowment Fund</i> \$15,000 00	7313845	6/25/2013	\$15,000 00	
Jeremiah's Inn <i>Technology Upgrades</i> \$10,000 00	7313897	9/23/2013	\$10,000 00	
Jeremiah's Inn <i>Santa Claus Grant</i> \$5,000 00	7314242	12/19/2013	\$5,000 00	
Jericho Road Project, Inc. <i>Operating Support</i> \$10,000 00	7313972	12/19/2013	\$10,000 00	
Jewish Family & Children's Service <i>Infrastructure Needs</i> \$10,000 00	7313643	4/2/2013	\$10,000 00	19861
Joy of Music Program, Inc. <i>Financial Aid</i> \$5,000 00	7314043	12/19/2013	\$5,000 00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Kennebunkport Conservation Trust <i>Santa Claus Grant</i> \$2,500 00	7314243	12/19/2013	\$2,500 00	
Kennedy-Donovan Center, Inc. <i>Play Space Renovations</i> \$4,000 00	7313651	4/2/2013	\$4,000 00	19862
Leicester Public Library <i>Library Expansion</i> \$10,000 00	7313729	6/25/2013	\$10,000 00	
Literacy Volunteers of Greater Worcester <i>Operating Support</i> \$8,000 00	7313881	9/23/2013	\$8,000 00	
Lutheran Social Services of New England, Inc. <i>Service Center</i> \$120,000 00	7313846	6/25/2013	\$40,000 00	
Lutheran Social Services of New England, Inc. <i>Service Center</i> \$120,000 00	7313846	12/19/2013	\$40,000 00	
Lutheran Social Services of New England, Inc. <i>Service Center</i> \$120,000 00	7313846	12/19/2013	\$40,000 00	
Main South Community Development Corporation <i>Operating Support</i> \$20,000 00	7313842	6/25/2013	\$20,000 00	
Massachusetts Audubon Society-Worcester <i>Capital Campaign</i> \$400,000 00	7313853	6/25/2013	\$100,000 00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Massachusetts Audubon Society-Worcester <i>Capital Campaign</i> \$400,000 00	7313853	12/19/2013	\$100,000 00	
Massachusetts College of Pharmacy and Health Sciences <i>Lab & Clinic Creation</i> \$300,000 00	7313975	12/19/2013	\$100,000 00	
Massachusetts General Hospital <i>Santa Claus Grant</i> \$1,000 00	7314310	12/19/2013	\$1,000 00	
Massachusetts Society for the Prevention of Cruelty to Children <i>Program Support</i> \$7,500 00	7313652	4/2/2013	\$7,500 00	19864
Massachusetts Symphony Orchestra <i>2013 Summer Concerts</i> \$15,000 00	7313693	6/25/2013	\$15,000 00	
Massachusetts Symphony Orchestra <i>Tuckerman Hall Renovations</i> \$100,000 00	7314045	12/19/2013	\$100,000 00	
McAuley Nazareth Home for Boys <i>Van Purchase</i> \$10,000 00	7313841	6/25/2013	\$10,000 00	
Medomak Valley Land Trust <i>Santa Claus Grant</i> \$2,000 00	7314311	12/19/2013	\$2,000 00	
Middlebury College <i>Santa Claus Grant</i> \$2,500 00	7314309	12/19/2013	\$2,500 00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Mohegan Council, Inc., Boy Scouts of America <i>Emergency Capital Repairs</i> \$15,000 00	7313852	6/25/2013	\$15,000 00	
Music Worcester, Inc. <i>Santa Claus Grant</i> \$5,000 00	7314244	12/19/2013	\$5,000 00	
My Neighbors Foundation <i>Santa Claus Grant</i> \$1,000 00	7314316	12/19/2013	\$1,000 00	
The New School <i>Santa Claus Grant</i> \$2,500 00	7314321	12/19/2013	\$2,500 00	
Oak Hill Community Development Corporation <i>Operating Support</i> \$12,000 00	7313849	6/25/2013	\$12,000 00	
Oakland School Foundation/Urban Promise Academy <i>Santa Claus Grant</i> \$1,000 00	7314315	12/19/2013	\$1,000 00	
OARS <i>Santa Claus Grant</i> \$2,500 00	7314245	12/19/2013	\$2,500 00	
Pan-Mass Challenge <i>Santa Claus Grant</i> \$3,000 00	7314290	12/20/2013	\$3,000 00	
Park School of Baltimore <i>Santa Claus Grant</i> \$1,000 00	7314314	12/19/2013	\$1,000 00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Pickering Foundation <i>Santa Claus Grant</i> \$5,000 00	7314246	12/19/2013	\$5,000 00	
Pleasant Street Neighborhood Network Center <i>2013 Programming</i> \$5,000 00	7313653	4/2/2013	\$5,000 00	19869
Project Bread <i>Santa Claus Grant</i> \$2,500 00	7314313	12/19/2013	\$2,500 00	
Quebec Labrador Foundation <i>Santa Claus Grant</i> \$5,000 00	7314287	12/20/2013	\$5,000 00	
Quinsigamond Community College Foundation <i>HACE Youth Recognition Awards Program</i> \$2,000 00	7313738	6/25/2013	\$2,000 00	
Rachel's Table <i>Children's Mik Fund</i> \$5,000 00	7314134	12/19/2013	\$5,000 00	
Regatta Point Community Sailing <i>Program Support</i> \$3,000 00	7314148	12/19/2013	\$3,000 00	
Regional Environmental Council of Central Massachusetts <i>Operating Support</i> \$10,000 00	7314151	12/19/2013	\$10,000 00	
River Tree Arts <i>Santa Claus Grant</i> \$2,500 00	7314312	12/19/2013	\$2,500 00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Salvation Army of Worcester <i>Building Renovations</i> \$100,000 00	7313847	6/25/2013	\$50,000 00	
Salvation Army of Worcester <i>Building Renovations</i> \$100,000 00	7313847	12/19/2013	\$50,000 00	
Save the Bay <i>Santa Claus Grant</i> \$1,000 00	7314317	12/19/2013	\$1,000 00	
Schuykill Center <i>Santa Claus Grant</i> \$1,000 00	7314320	12/19/2013	\$1,000 00	
Science of Spirituality <i>Santa Claus Grant</i> \$5,000 00	7314319	12/19/2013	\$5,000 00	
Seven Hills Foundation <i>ASPIRE Campaign</i> \$300,000 00	7313428	12/19/2013	\$150,000 00	
Southborough Open Land Foundation Inc <i>Santa Claus Grant</i> \$2,500 00	7314247	12/19/2013	\$2,500 00	
Springside Chestnut Hill Academy Fund <i>Santa Claus Grant</i> \$2,000 00	7314318	12/19/2013	\$2,000 00	
Stone Soup Artist Activist Collective and Community Resource Center <i>King Street Renovations</i> \$15,000 00	7313880	9/23/2013	\$15,000 00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
T. W. Wood Art Gallery and Art Center <i>Santa Claus Grant</i> \$5,000 00	7314250	12/19/2013	\$5,000 00	
Tenacity, Inc. <i>2013 Programs</i> \$10,000 00	7313730	6/25/2013	\$10,000 00	
Timmy's Kids <i>Santa Claus Grant</i> \$5,000 00	7314248	12/19/2013	\$5,000 00	
Trinity College <i>Santa Claus Grant</i> \$1,500 00	7314292	12/20/2013	\$1,500 00	
Union College <i>Santa Claus Grant</i> \$1,500 00	7314291	12/20/2013	\$1,500 00	
United Way of Central Massachusetts <i>2013 Campaign</i> \$120,000 00	7313908	9/23/2013	\$120,000 00	
United Way of Central Massachusetts <i>2012 Campaign</i> \$120,000 00	7313261	9/23/2013	\$120,000 00	
United Way of Central Massachusetts <i>Santa Claus Grant</i> \$2,500 00	7314249	12/19/2013	\$2,500 00	
University of Massachusetts Medical School <i>Experiential Learning Center</i> \$300,000 00	6356661	12/19/2013	\$100,000 00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
VNA Care Network & Hospice, Inc. Technology & Equipment \$50,000 00	7313854	6/25/2013	\$50,000 00	
Wardrobe for Opportunity Santa Claus Grant \$2,000 00	7314323	12/19/2013	\$2,000 00	
WICN Santa Claus Grant \$5,000 00	7314288	12/20/2013	\$5,000 00	
Worcester Academy Capital Campaign \$150,000 00	7313860	6/25/2013	\$50,000 00	
Worcester Academy Capital Campaign \$150,000 00	7313860	12/19/2013	\$50,000 00	
Worcester Animal Rescue League Capital Needs \$50,000 00	7314766	8/6/2013	\$50,000 00	
Worcester Animal Rescue League Santa Claus Grant \$5,000 00	7314251	12/19/2013	\$5,000 00	
Worcester Anti-Foreclosure Team (Worcester Common Ground- Fiscal Agent) Operating Support \$5,000 00	7313667	4/2/2013	\$5,000 00	19884
Worcester Art Museum Higgins Armory Collection \$1,500,000 00	7313851	6/25/2013	\$300,000 00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Worcester Art Museum <i>Director Endowment</i> \$2,000,000 00	3740668	8/1/2013	\$100,000 00	
Worcester Art Museum <i>Higgins Armory Collection</i> \$1,500,000 00	7313851	12/19/2013	\$300,000 00	
Worcester Center for Crafts <i>Ceramics Studio</i> \$150,000 00	7313857	6/25/2013	\$100,000 00	
Worcester Center for Crafts <i>Ceramics Studio</i> \$150,000 00	7313857	12/19/2013	\$50,000 00	
Worcester Chamber Music Society <i>Santa Claus Grant</i> \$2,500 00	7314252	12/19/2013	\$2,500 00	
Worcester Community Action Council, Inc. <i>Technology Upgrades</i> \$25,000 00	7313912	9/23/2013	\$25,000 00	
Worcester Community Housing Resources, Inc. <i>2014 Programming</i> \$15,000 00	7314138	12/19/2013	\$15,000 00	
Worcester County Food Bank <i>Santa Claus Grant</i> \$2,500 00	7314324	12/19/2013	\$2,500 00	
Worcester County Food Bank <i>Santa Claus Grant</i> \$2,500 00	7314253	12/19/2013	\$2,500 00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Worcester Education Collaborative Operating Support \$10,000 00	7313736	6/25/2013	\$10,000 00	
Worcester Educational Development Foundation, Inc. Operating Support \$10,000 00	7313844	6/25/2013	\$10,000 00	
Worcester Interfaith, Inc. 2013 Programs \$5,000 00	7313747	6/25/2013	\$5,000 00	
Worcester Latino Dollars for Scholars College Textbooks \$3,000 00	7313642	4/2/2013	\$3,000 00	19881
Worcester Polytechnic Institute Project Center \$750,000 00	5575639	8/1/2013	\$250,000 00	
Worcester Polytechnic Institute Santa Claus Grant \$2,000 00	7314327	12/19/2013	\$2,000 00	
Worcester Regional Chamber of Commerce Development Advancement Fund \$40,000 00	7314121	12/19/2013	\$40,000 00	
Worcester Regional Research Bureau, Inc. Operating Support \$9,000 00	7313678	6/25/2013	\$9,000 00	
Worcester State University Equipment & Renovations \$150,000 00	7313914	9/23/2013	\$75,000 00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Worcester State University Equipment & Renovations \$150,000 00	7313914	12/19/2013	\$75,000 00	
Worcester Youth Center, Inc. Programming Support \$15,000 00	7313906	9/23/2013	\$15,000 00	
Y.O.U., Inc. Santa Claus Grant \$5,000 00	7314254	12/19/2013	\$5,000 00	
Y.O.U., Inc. Santa Claus Grant \$2,500 00	7314328	12/19/2013	\$2,500 00	
YMCA of Central Massachusetts Annual Campaign \$10,000 00	7314092	12/19/2013	\$10,000 00	
YMCA of Central Massachusetts Santa Claus Grant \$5,000 00	7314255	12/19/2013	\$5,000 00	
YouthConnect Summer 2013 Summer Programs \$10,000 00	7313640	4/2/2013	\$10,000 00	19883
Total Stoddard Charitable Trust (141 items)			\$4,139,500 00	
Grand Total (141 items)			\$4,139,500 00	

Stoddard Payments Due After 2013

11/10/2014

Payee Organization Project Title, Grant Amount	Request ID Ref. No.	Due Date	Payment Amount Notes
<u>Stoddard Charitable Trust</u>			
Blackstone River Valley National Heritage Corridor <i>Operating Support</i> \$60,000 00	7313919	12/1/2014	\$20,000 00
Blackstone River Valley National Heritage Corridor <i>Operating Support</i> \$60,000 00	7313919	12/1/2015	\$15,000 00
Friends of Hope Cemetery <i>Water Pipe Project</i> \$150,000 00	7313920	4/1/2014	\$150,000 00
Hanover Theatre for the Performing Arts <i>551 Main Street</i> \$300,000 00	7314638	9/1/2015	\$100,000 00
Hanover Theatre for the Performing Arts <i>551 Main Street</i> \$300,000 00	7314638	9/1/2016	\$100,000 00
Massachusetts Audubon Society-Worcester <i>Capital Campaign</i> \$400,000 00	7313853	6/25/2015	\$100,000 00
Massachusetts Audubon Society-Worcester <i>Capital Campaign</i> \$400,000 00	7313853	6/25/2016	\$100,000 00
Massachusetts College of Pharmacy and Health Sciences <i>Lab & Clinic Creation</i> \$300,000 00	7313975	12/1/2014	\$100,000 00

Payee Organization Project Title, Grant Amount	Request ID Ref. No.	Due Date	Payment Amount Notes
Massachusetts College of Pharmacy and Health Sciences <i>Lab & Clinic Creation</i> \$300,000 00	7313975	12/1/2015	\$100,000 00
Quinsigamond Community College Foundation <i>18-20 Franklin Street</i> \$500,000 00	7314522	6/1/2015	\$150,000 00
Quinsigamond Community College Foundation <i>18-20 Franklin Street</i> \$500,000 00	7314522	6/1/2016	\$100,000 00
Worcester Academy <i>Capital Campaign</i> \$150,000 00	7313860	6/25/2015	\$50,000 00
Worcester Art Museum <i>Higgins Armory Collection</i> \$1,500,000 00	7313851	6/25/2015	\$300,000 00
Worcester Art Museum <i>Higgins Armory Collection</i> \$1,500,000 00	7313851	6/25/2016	\$300,000 00
Worcester Art Museum <i>Higgins Armory Collection</i> \$1,500,000 00	7313851	6/25/2017	\$300,000 00
Worcester Community Cable Access, Inc. <i>iSMARTT Center</i> \$50,000 00	7098786	7/2/2014	\$50,000 00 Reissue of Payment [10873406] for \$50,000 00
Worcester Interfaith, Inc. <i>Clemente Courses</i> \$45,000 00	7314437	6/1/2015	\$15,000 00

Payee Organization Project Title, Grant Amount	Request ID Ref. No.	Due Date	Payment Amount Notes
Worcester Interfaith, Inc. <i>Clemente Courses</i> \$45,000 00	7314437	6/1/2016	\$10,000 00
YMCA of Central Massachusetts <i>Capital Campaign</i> \$1,000,000 00	7314370	3/28/2015	\$200,000 00
YMCA of Central Massachusetts <i>Capital Campaign</i> \$1,000,000 00	7314370	3/28/2016	\$200,000 00
YMCA of Central Massachusetts <i>Capital Campaign</i> \$1,000,000 00	7314370	3/28/2017	\$200,000 00
YMCA of Central Massachusetts <i>Capital Campaign</i> \$1,000,000 00	7314370	3/28/2018	\$200,000 00
Total Stoddard Charitable Trust (22 items)			\$2,860,000 00
Grand Total (22 items)			\$2,860,000 00