



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



Form 990-PF

Department of the Treasury
Internal Revenue Service

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.

OMB No 1545-0052

2013

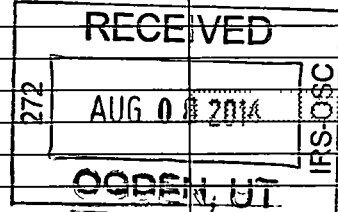
Open to Public Inspection

For calendar year 2013 or tax year beginning

, and ending

Name of foundation ABBOT & DOROTHY H. STEVENS FOUNDATION		A Employer identification number 04-6107991
Number and street (or P.O. box number if mail is not delivered to street address) P.O. BOX 111		B Telephone number (978) 688-7211
City or town, state or province, country, and ZIP or foreign postal code NORTH ANDOVER, MA 01845		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 25309339.	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				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		531322.	531322.		Statement 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		1368018.			
b Gross sales price for all assets on line 6a		5615896.			
7 Capital gain net income (from Part IV, line 2)			1368018.		
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					
12 Total. Add lines 1 through 11		1899340.	1899340.		
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 2		7900.	0.		0.
c Other professional fees Stmt 3		90824.	90824.		0.
17 Interest					
18 Taxes Stmt 4		52012.	10537.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses Stmt 5		85200.	0.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		235936.	101361.		0.
25 Contributions, gifts, grants paid		1305468.			1305468.
26 Total expenses and disbursements. Add lines 24 and 25		1541404.	101361.		1305468.
27 Subtract line 26 from line 12		357936.			
a Excess of revenue over expenses and disbursements			1797979.		
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)				N/A	



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		124176.	14333.	14333.
	2	Savings and temporary cash investments		869700.	1659752.	1659752.
	3	Accounts receivable ▶				
		Less: allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U S and state government obligations Stmt 6	499642.	499748.	578905.	
	b	Investments - corporate stock Stmt 7	16660064.	16856464.	21625675.	
	c	Investments - corporate bonds Stmt 8	1881727.	1362948.	1430674.	
	11	Investments - land, buildings, and equipment basis ▶				
	Less: accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other					
14	Land, buildings, and equipment basis ▶					
	Less: accumulated depreciation ▶					
15	Other assets (describe ▶)					
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)			20035309.	20393245.	25309339.
Liabilities	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 checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted		20035309.	20393245.	
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds				
	28	Paid-in or capital surplus, or land, bldg, and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
	30	Total net assets or fund balances		20035309.	20393245.	
	31	Total liabilities and net assets/fund balances		20035309.	20393245.	

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	20035309.
2	Enter amount from Part I, line 27a	2	357936.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	20393245.
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	20393245.

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 Statements			
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 5615896.		4247878.	1368018.

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			1368018.

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	1368018.
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	943533.	21781340.	.043318
2011	1051400.	20940084.	.050210
2010	971750.	19867180.	.048912
2009	1145450.	18013856.	.063587
2008	1471565.	21246902.	.069260

2 Total of line 1, column (d)	2	.275287
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	.055057
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	24050704.
5 Multiply line 4 by line 3	5	1324160.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	17980.
7 Add lines 5 and 6	7	1342140.
8 Enter qualifying distributions from Part XII, line 4	8	1305468.

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 type="checkbox"/> and enter 1% of Part I, line 27b		1	35960.
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	35960.
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	35960.
6 Credits/Payments			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	33505.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	3000.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments Add lines 6a through 6d	7	36505.	
8 Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	127.	
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	418.	
11 Enter the amount of line 10 to be Credited to 2014 estimated tax <input type="checkbox"/> 418. 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 type="checkbox"/> \$ 0. (2) On foundation managers <input 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 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?		
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 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

N/A

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 ► JOSHUA L. MINER Telephone no ► 978-688-7211 Located at ► P.O. BOX 111, NORTH ANDOVER, MA ZIP+4 ► 01845			
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ►		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions) 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

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.

6b

X

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
JOSHUA L MINER 356 MAIN STREET BOXFORD, MA 01921	TRUSTEE 1.00	0.	0.	0.
DEBORAH D PUTNAM 32 ARBOROUGH ROAD ROSLINDALE, MA 02131	TRUSTEE 1.00	0.	0.	0.
CHRISTOPHER W ROGERS 46 OCEAN STREET NAHANT, MA 01908	TRUSTEE 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

0

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	23392375.
b	Average of monthly cash balances	1b	1024583.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	24416958.
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	24416958.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	366254.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	24050704.
6	Minimum investment return. Enter 5% of line 5	6	1202535.

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	1202535.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	35960.
b	Income tax for 2013 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	35960.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1166575.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1166575.
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	1166575.

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	1305468.
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	1305468.
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	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1305468.

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				1166575.
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	427890.			
b From 2009	253568.			
c From 2010				
d From 2011	33838.			
e From 2012				
f Total of lines 3a through e	715296.			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$	1305468.			
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				1166575.
e Remaining amount distributed out of corpus	138893.			
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	854189.			
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	427890.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	426299.			
10 Analysis of line 9:				
a Excess from 2009	253568.			
b Excess from 2010				
c Excess from 2011	33838.			
d Excess from 2012				
e Excess from 2013	138893.			

N/A

☐ 4942(j)(3) or ☐ 4942(j)(5)

(4) Gross investment income

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				
PLEASE SEE ATTACHED SCHEDULE	UNRELATED ORGANIZATION	501(C)(3) CHARITABLE ORGANIZ.	CHARITABLE PURPOSE	1305468.
Total			3a	1305468.
b Approved for future payment				
PLEASE SEE ATTACHED SCHEDULE	UNRELATED ORGANIZATION	501(C)(3) CHARITABLE ORGANIZ.	CHARITABLE PURPOSE	300350.
Total			3b	300350.

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




		Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		
a	Transfers from the reporting foundation to a noncharitable exempt organization of		
	(1) Cash	1a(1)	X
	(2) Other assets	1a(2)	X
b	Other transactions		
	(1) Sales of assets to a noncharitable exempt organization	1b(1)	X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)	X
	(3) Rental of facilities, equipment, or other assets	1b(3)	X
	(4) Reimbursement arrangements	1b(4)	X
	(5) Loans or loan guarantees	1b(5)	X
	(6) Performance of services or membership or fundraising solicitations	1b(6)	X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c	X
d	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.		

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule		
(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

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 8/1/2014 Title TRUSTEE

May the IRS discuss this return with the preparer shown below (see Instr.)? ☒ Yes ☐ No

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature <i>Carl B. Bindman, CPA</i> Carl B. Bindman	Date	Check <input type="checkbox"/> if self-employed	PTIN
	Carl B. Bindman		07/18/14		P00064356
	Firm's name ▶ CARL B. BINDMAN, CPA, P.C.			Firm's EIN ▶ 04-2976995	
	Firm's address ▶ 18 RAILROAD AVENUE ANDOVER, MA 01810			Phone no (978) 470-2027	

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	DENTSPLY	P	Various	12/24/13
b	WASTE MGT	P	Various	12/02/13
c	WASTE MGT	P	Various	11/26/13
d	LIBERTY INTERACTIVE	P	01/07/08	11/26/13
e	LIBERTY INTERACTIVE	P	01/07/08	11/25/13
f	LIBERTY INTERACTIVE	P	01/07/08	11/21/13
g	LIBERTY INTERACTIVE	P	01/07/08	11/20/13
h	NOVARTIS	P	Various	11/19/13
i	WASTE MGT	P	Various	11/19/13
j	NOVARTIS	P	Various	11/18/13
k	WASTE MGT	P	Various	11/05/13
l	DENTSPLY	P	Various	10/29/13
m	DENTSPLY	P	Various	10/28/13
n	HENRY SCHEIN	P	Various	10/28/13
o	PIMCO	P	Various	10/25/13

(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 48668.		24879.	23789.
b 9362.		7303.	2059.
c 8231.		6320.	1911.
d 20688.		11420.	9268.
e 15764.		8706.	7058.
f 12168.		6709.	5459.
g 12229.		6708.	5521.
h 36941.		26644.	10297.
i 36158.		28088.	8070.
j 10132.		7298.	2834.
k 61214.		49154.	12060.
l 11315.		6244.	5071.
m 6344.		3508.	2836.
n 12998.		7511.	5487.
o 221948.		225000.	-3052.

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			23789.
b			2059.
c			1911.
d			9268.
e			7058.
f			5459.
g			5521.
h			10297.
i			8070.
j			2834.
k			12060.
l			5071.
m			2836.
n			5487.
o			-3052.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	
3 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	

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	PIMCO	P	Various	10/25/13
b	PIMCO	P	Various	10/25/13
c	HENRY SCHEIN	P	Various	10/25/13
d	HENRY SCHEIN	P	Various	10/25/13
e	PIMCO	P	Various	10/25/13
f	HENRY SCHEIN	P	Various	10/24/13
g	DENTSPLY	P	Various	10/24/13
h	DENTSPLY	P	Various	10/21/13
i	GOOGLE	P	Various	10/21/13
j	GOOGLE	P	Various	10/21/13
k	DENTSPLY	P	Various	10/21/13
l	EOG	P	Various	10/18/13
m	EOG	P	Various	10/18/13
n	DENTSPLY	P	Various	10/17/13
o	DENTSPLY	P	Various	10/16/13

(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	234843.	251633.	-16790.
b	187135.	200000.	-12865.
c	9211.	5328.	3883.
d	1443.	832.	611.
e	106073.	105490.	583.
f	9666.	5567.	4099.
g	9397.	5174.	4223.
h	29643.	19194.	10449.
i	202615.	118164.	84451.
j	22067.	12703.	9364.
k	2478.	1343.	1135.
l	91778.	42708.	49070.
m	55067.	28194.	26873.
n	25171.	16817.	8354.
o	14857.	9924.	4933.

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			-16790.
b			-12865.
c			3883.
d			611.
e			583.
f			4099.
g			4223.
h			10449.
i			84451.
j			9364.
k			1135.
l			49070.
m			26873.
n			8354.
o			4933.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	
3 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	

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	ADP	P	02/29/08	09/17/13
b	ADP	P	02/29/08	09/16/13
c	ADP	P	02/29/08	09/11/13
d	ADP	P	02/29/08	09/10/13
e	ADP	P	02/29/08	08/13/13
f	HENRY SCHEIN	P	Various	08/08/13
g	HENRY SCHEIN	P	Various	08/06/13
h	JOHNSON & JOHNSON	P	Various	08/05/13
i	HENRY SCHEIN	P	10/17/11	08/05/13
j	WALGREEN	P	Various	08/01/13
k	ADP	P	02/29/08	07/31/13
l	HENRY SCHEIN	P	10/17/11	07/25/13
m	HENRY SCHEIN	P	10/17/11	07/23/13
n	ADP	P	02/29/08	07/23/19
o	BERKSHIRE HATHAWAY	P	Various	07/19/13

(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	35515.	19223.	16292.
b	23768.	12815.	10953.
c	22327.	12175.	10152.
d	44054.	23869.	20185.
e	29122.	16019.	13103.
f	9602.	5823.	3779.
g	7245.	4415.	2830.
h	37489.	24959.	12530.
i	4195.	2559.	1636.
j	200000.	200000.	0.
k	8268.	4566.	3702.
l	8351.	5183.	3168.
m	22678.	14013.	8665.
n	20784.	11454.	9330.
o	533065.	260563.	272502.

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			16292.
b			10953.
c			10152.
d			20185.
e			13103.
f			3779.
g			2830.
h			12530.
i			1636.
j			0.
k			3702.
l			3168.
m			8665.
n			9330.
o			272502.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	
3 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	

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	PEPSICO	P	11/18/08	07/19/13
b	PEPSICO	P	Various	07/18/13
c	PEPSICO	P	Various	07/18/13
d	LIBERTY INTERACTIVE	P	Various	07/18/13
e	LIBERTY INTERACTIVE	P	Various	07/18/13
f	ADP	P	02/29/08	07/17/13
g	HENRY SCHEIN	P	10/17/11	07/17/13
h	HENRY SCHEIN	P	10/17/11	07/16/13
i	HENRY SCHEIN	P	10/17/11	07/15/13
j	LIBERTY INTERACTIVE	P	01/04/08	07/15/13
k	ADP	P	02/29/08	07/15/13
l	PEPSICO	P	Various	07/12/13
m	LIBERTY INTERACTIVE	P	01/04/08	07/12/13
n	ADP	P	02/29/08	07/11/13
o	PITNEY BOWES	P	Various	06/15/13

(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	11502.	6940.	4562.
b	14499.	8714.	5785.
c	26047.	15903.	10144.
d	2449.	1525.	924.
e	16749.	10427.	6322.
f	23177.	12815.	10362.
g	9711.	6079.	3632.
h	9821.	6143.	3678.
i	11144.	6974.	4170.
j	9695.	6037.	3658.
k	5803.	3204.	2599.
l	33609.	21204.	12405.
m	17629.	10976.	6653.
n	43153.	24029.	19124.
o	100000.	100000.	0.

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			4562.
b			5785.
c			10144.
d			924.
e			6322.
f			10362.
g			3632.
h			3678.
i			4170.
j			3658.
k			2599.
l			12405.
m			6653.
n			19124.
o			0.

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	
3	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	

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	DIAGEO	P	Various	05/28/13
b	DIAGEO	P	Various	05/24/13
c	JOHNSON & JOHNSON	P	11/18/09	05/20/13
d	ADP	P	02/29/08	05/13/13
e	BAXTER INTL	P	04/22/10	05/13/13
f	CHUBB	P	Various	05/13/13
g	EOG	P	Various	05/13/13
h	JOHNSON & JOHNSON	P	11/18/09	05/13/13
i	LIBERTY INTERACTIVE	P	Various	05/13/13
j	LIBERTY INTERACTIVE	P	Various	05/13/13
k	NESTLE	P	Various	05/13/13
l	NOVARTIS	P	Various	05/13/13
m	PEPSICO	P	Various	05/13/13
n	PEPSICO	P	Various	05/13/13
o	PROGRESSIVE	P	Various	05/13/13

(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	11258.	5085.	6173.
b	13350.	6091.	7259.
c	26392.	18719.	7673.
d	14006.	8010.	5996.
e	63549.	45231.	18318.
f	53611.	33023.	20588.
g	40068.	28194.	11874.
h	17124.	12479.	4645.
i	6941.	5499.	1442.
j	25451.	16770.	8681.
k	48845.	17713.	31132.
l	22379.	16971.	5408.
m	8300.	5321.	2979.
n	8300.	5301.	2999.
o	28159.	19649.	8510.

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			6173.
b			7259.
c			7673.
d			5996.
e			18318.
f			20588.
g			11874.
h			4645.
i			1442.
j			8681.
k			31132.
l			5408.
m			2979.
n			2999.
o			8510.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	
3 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	

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	HENRY SCHEIN	P	10/17/11	05/13/13
b	SOUTHWSTN ENERGY	P	07/27/10	05/13/13
c	TARGET	P	Various	05/13/13
d	U S BANCORP	P	12/18/09	05/13/13
e	WAL-MART	P	Various	05/13/13
f	WAL-MART	P	Various	05/13/13
g	WASTE MGT	P	Various	05/13/13
h	WELLS FARGO	P	Various	05/13/13
i	PEPSICO	P	10/28/08	05/03/13
j	PEPSICO	P	07/10/07	04/18/13
k	PEPSICO	P	07/10/07	04/16/13
l	ADP	P	Various	04/15/13
m	ADP	P	Various	04/15/13
n	HENRY SCHEIN	P	10/17/11	04/15/13
o	WASTE MGT	P	Various	04/15/13

(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 18951.		12797.	6154.
b 61760.		63068.	-1308.
c 48533.		35654.	12879.
d 56881.		37758.	19123.
e 7835.		4650.	3185.
f 15670.		9879.	5791.
g 16364.		14044.	2320.
h 76218.		65167.	11051.
i 49694.		31928.	17766.
j 36943.		30553.	6390.
k 30311.		25173.	5138.
l 58988.		36044.	22944.
m 39325.		23859.	15466.
n 64052.		44790.	19262.
o 62216.		56176.	6040.

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			6154.
b			-1308.
c			12879.
d			19123.
e			3185.
f			5791.
g			2320.
h			11051.
i			17766.
j			6390.
k			5138.
l			22944.
m			15466.
n			19262.
o			6040.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	
3 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	

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 T ROWE PRICE		P	Various	04/15/13
b DENTSPLY		P	Various	04/15/13
c EBAY		P	Various	04/15/13
d JOHNSON & JOHNSON		P	Various	04/15/13
e NOVARTIS		P	Various	04/15/13
f PEPSICO		P	Various	04/12/13
g PEPSICO		P	Various	04/11/13
h BAXTER INTL		P	Various	04/02/13
i BAXTER INTL		P	Various	04/01/13
j DENTSPLY		P	Various	03/20/13
k DENTSPLY		P	Various	03/20/13
l DELL		P	Various	03/04/13
m DELL		P	Various	03/04/13
n HP		P	Various	03/01/13
o ANHEUSER-BUSCH		P	Various	08/28/13

(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 400000.		372800.	27200.
b 58804.		41597.	17207.
c 22687.		9619.	13068.
d 58022.		43678.	14344.
e 133338.		101826.	31512.
f 47982.		39851.	8131.
g 28874.		23977.	4897.
h 29661.		20605.	9056.
i 27113.		18846.	8267.
j 21235.		14951.	6284.
k 40515.		28345.	12170.
l 12565.		17691.	-5126.
m 122858.		198675.	-75817.
n 100000.		100000.	0.
o 21972.		12263.	9709.

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			27200.
b			17207.
c			13068.
d			14344.
e			31512.
f			8131.
g			4897.
h			9056.
i			8267.
j			6284.
k			12170.
l			-5126.
m			-75817.
n			0.
o			9709.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	
3 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	

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	ANHEUSER-BUSCH	P	Various	02/25/13
b	ANHEUSER-BUSCH	P	Various	02/20/13
c	DELL	P	Various	02/15/13
d	PEPSICO	P	Various	02/15/13
e	DELL	P	Various	02/15/13
f	DELL	P	Various	02/13/13
g	DELL	P	Various	02/13/13
h	EBAY	P	Various	02/12/13
i	EBAY	P	Various	02/08/13
j	EBAY	P	Various	02/08/13
k	ANHEUSER-BUSCH	P	Various	01/29/13
l	ANHEUSER-BUSCH	P	Various	01/28/13
m	Capital Gains Dividends			
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 17487.		9748.	7739.
b 26311.		14674.	11637.
c 785.		1512.	-727.
d 100000.		100000.	0.
e 15147.		24834.	-9687.
f 54395.		104568.	-50173.
g 9657.		18893.	-9236.
h 101761.		42975.	58786.
i 3475.		871.	2604.
j 25753.		10870.	14883.
k 25347.		14464.	10883.
l 29677.		16980.	12697.
m 181946.			181946.
n			
o			

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			7739.
b			11637.
c			-727.
d			0.
e			-9687.
f			-50173.
g			-9236.
h			58786.
i			2604.
j			14883.
k			10883.
l			12697.
m			181946.
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	1368018.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter "-0-" in Part I, line 8 }	3	N/A

Form 990-PF Dividends and Interest from Securities Statement 1

Source	Gross Amount	Capital Gains Dividends	(a) Revenue Per Books	(b) Net Investment Income	(c) Adjusted Net Income
BOND AMORTIZATION	-18673.	0.	-18673.	-18673.	
DIVIDENDS - TIMING DIFFERENCES	4311.	0.	4311.	4311.	
DIVIDENDS PER BBH 1099	606650.	181946.	424704.	424704.	
DIVIDENDS REPORTED IN 2012 RECEIVED IN 2013	3793.	0.	3793.	3793.	
INTEREST PER BBH 1099	117187.	0.	117187.	117187.	
To Part I, line 4	713268.	181946.	531322.	531322.	

Form 990-PF Accounting Fees Statement 2

Description	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
CARL B. BINDMAN, CPA, PC - AUDIT AND TAX	7900.	0.		0.
To Form 990-PF, Pg 1, ln 16b	7900.	0.		0.

Form 990-PF Other Professional Fees Statement 3

Description	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
INVESTMENT FEES	90824.	90824.		0.
To Form 990-PF, Pg 1, ln 16c	90824.	90824.		0.

Form 990-PF	Taxes			Statement 4
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
FEDERAL EXCISE TAXES	41225.	0.		0.
FOREIGN TAXES	10537.	10537.		0.
STATE FILING FEE	250.	0.		0.
To Form 990-PF, Pg 1, ln 18	52012.	10537.		0.

Form 990-PF	Other Expenses			Statement 5
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
OFFICE EXPENSE REIMBURSEMENT TO AFFILIATED 501(C)(3)	85200.	0.		0.
To Form 990-PF, Pg 1, ln 23	85200.	0.		0.

Form 990-PF	U.S. and State/City Government Obligations			Statement 6
Description	U.S. Gov't	Other Gov't	Book Value	Fair Market Value
US TREASURY OBLIGATIONS	X		499748.	578905.
Total U.S. Government Obligations			499748.	578905.
Total State and Municipal Government Obligations				
Total to Form 990-PF, Part II, line 10a			499748.	578905.

Form 990-PF	Corporate Stock	Statement	7
-------------	-----------------	-----------	---

<u>Description</u>	<u>Book Value</u>	<u>Fair Market Value</u>
CORPORATE STOCK	16856464.	21625675.
Total to Form 990-PF, Part II, line 10b	16856464.	21625675.

Form 990-PF	Corporate Bonds	Statement	8
-------------	-----------------	-----------	---

<u>Description</u>	<u>Book Value</u>	<u>Fair Market Value</u>
CORPORATE BONDS	1362948.	1430674.
Total to Form 990-PF, Part II, line 10c	1362948.	1430674.

Abbot and Dorothy H. Stevens Foundation

**Post Office Box 111 - North Andover, MA 01845
Telephone 978-688-7211**

Mission statement: The Stevens Foundations are committed to improving the quality of life for residents of Lawrence, Massachusetts and surrounding communities. By initiating and participating in collaboration with community partners, the Foundations strive to understand the needs of the community and to be proactive contributors. Efforts are directed toward supporting and promoting education, housing, healthcare, environment, historical preservation and the arts; and providing emergency assistance.

Eligibility Requirements:

- 1. Any organization applying to The Stevens Foundations must be a Massachusetts charitable corporation. The Trustees focus their giving to organizations serving the residents of the Greater Lawrence/Merrimack Valley area.**
- 2. An organization must have been determined tax-exempt under Section 501 (c) (3) of the Internal Revenue Code and received a permanent or advance I.R.S. Determination Letter that describes the agency as a publicly supported charity as defined in Sections 170 (b) (1) (A) (6) or (a) (6).**
- 3. No grants to individuals.**
- 4. Applications will be considered for experimental and demonstration projects, program expansion, evaluation, renovations, new construction projects and capital funding.**
- 5. The Trustees will not consider a proposal from an organization previously funded until a full report of the expenditures of the previous grant has been submitted.**
- 6. The Trustees will not consider more than one application from an agency in the same calendar year, except for summer youth programs.**
- 7. No grants will be made to national organizations or "annual giving campaigns".**
- 8. No grants will be made to State or Federal agencies.**
- 9. Grants may be made to a 501 (c) (3) organization for the benefit of another organization awaiting its own tax-exempt status.**

Abbot and Dorothy H. Stevens Foundation

Application Procedures

1. One complete written proposal should be submitted to the Foundations' Office attention: Joshua L. Miner, Executive Director. It will be considered by the appropriate Stevens Foundation automatically. In addition to the mailed "hard copy" of the proposal, the proposal narrative, organizational budget and budget for the project for which you are seeking funding, should be e-mailed to: grantprocess@stevensfoundation.com. No personal interviews will be entertained unless requested by the Trustees.
2. The Associated Grant Makers of Massachusetts' Common Proposal format is accepted and welcomed by the Trustees.
3. The body of the proposal should be no more than five pages plus appendices. A one-page cover letter, summarizing the proposal and with a request for a specific grant amount should also be included.
4. The proposal will not be considered if the following is missing and has not been previously supplied:
 - a) Copy of I.R.S. Determination Letter
 - b) Proof of Incorporation in Massachusetts
 - c) Names of Officers, Directors or Trustees of the organization
5. A complete proposal should include:
 - a. Most recent annual financial statement (preferably audited)
 - b. Institutional Income & Expense budget for current fiscal year
 - c. Detailed program budget for which support is being requested
 - d. Starting & completion dates of proposed program and planned cash flow.
6. If an organization's proposal is complete and fits within the guidelines of The Stevens Foundations, the Director or other officer of that organization may be contacted to provide further details or information. Please include the name, address and telephone number of whom you wish contacted.
7. The Trustees of The Stevens Foundations generally meet monthly, with the exceptions of July and August. While awaiting a decision from The Stevens Foundations, applicants are encouraged to seek other sources of funding.

ABBOT & DOROTHY H. STEVENS FOUNDATION, Tax ID # 04-6107991			
Attachment to Form 990-PF, Part XV, #3a, Year Ended December 31, 2013			
Name of Recipient	Address of Recipient	Purpose of Grant	Amount
Associated Grantmakers	Ann Garchinsky, 55 Court St., Suite 20, Boston, MA 02108	Membership dues	\$ 5,350.00
Essex County Community Foundation	Jay Caporale, VP, 175 Andover Street, Suite 101, Danvers, MA 01923	Center for Non-Profit Excellence support, 15K due in 2014	\$ 20,000.00
Haniel & Haydn Society	Maile Helene Bernard Executive Director, Horticultural Hall, 300 Mass Ave., Boston, MA 02115	Lawrence outreach & Lawrence students to Symphony Hall	\$ 5,500.00
Project Adventure	Beth Norris, Director of Devel, 719 Cabot St., Beverly, MA 01915	programming in Lawrence schools-Health & Human Svcs HS & Wetherbee	\$ 31,000.00
Ridgewood Cemetery	PO Box 22, North Andover, MA 01845	Eagle Scout sign project	\$ 200.00
Asian Center of Merrimack Valley	Betsy Leeman, Exec. Director One Ballard Way, Lawrence MA 01843	Educational programming	\$ 10,000.00
ECF Betty Beland Greater Lawrence Summer Fund	Carol Lawrie Schuster, 175 Andover Street, Suite 101, Danvers, MA 01923	Summer program 2013	\$ 45,000.00
Merrimack River Watershed Council	Carol Shumway, Executive Director, 60 Island St., Suite 211-E, Lawrence, MA 01840	Educational programming & capacity building efforts	\$ 12,000.00
Merrimack Valley Hospice House	John Albert CEO, 360 Merrimack St., Lawrence, MA 01843	expansion - capital	\$ 55,000.00
American Textile History Museum	Jonathan Stevens, Executive Director, 491 Dutton Street, Lowell, MA 01853	operating	\$ 22,000.00
Bellesin Academy	Julia DiFilippo, Executive Director, 94 Bradford Street, Lawrence, MA	MV Families support	\$ 4,000.00
Family to Family Project	Scott K. Smith, Exec. Director, 14 Beacon St., Suite 202, Boston, MA 02108	Quintana Citizenship Center programming	\$ 25,000.00
Lawrence Family Devel & Educ Fund	Ralph Carreiro, Executive Director, 3 West Street, Lawrence, MA 01841	PALS (20K), ABL (25K) program support	\$ 45,000.00
Phillips Academy	Sharyn Babin, Major Gifts Officer, 180 Main Street, Andover, MA 01810	first 10K on 30K over 3 - operating for Prep @ Pingree	\$ 10,000.00
Pingree School - Prep @ Pingree	Steve Filosa, Director, P @ P, 537 Highland Street, So. Hamilton, MA 01982	Lawrence support for Teach for America	\$ 40,000.00
New Profit, Inc. I/O/o Teach for America	Joshua Biber, Exec. Director, 60 Canal Street, 3rd Fl., Boston, MA 02114	creation of Family Support Center	\$ 15,000.00
Fidelity House	Yvonne Allard, Executive Director, One Parker Street, Lawrence, MA 01843	Merrimack Valley Institute for Non-Profit Management	\$ 12,000.00
Boston University School of Management	Barry Dym, PhD, 595 Commonwealth Avenue, Boston, MA 02115	operating - family support svcs - 5K, Property purchase - 20K	\$ 25,000.00
Bread & Roses Housing	Mary Maera, Ex Dir, PO Box 7, Lawrence, MA 01840	renovation of 59 Jackson St. site	\$ 15,000.00
Casa Nueva Vida	Manuel Duran, Pres., 57 Jackson Street, Lawrence, MA 01840	CASA 23K, 7K Samaritans operating support	\$ 30,000.00
Family Service	Family Service, Inc., 430 North Canal Street, Lawrence, MA 01840	renovation of Haverhill Street, Lawrence clinic	\$ 50,000.00
Greater Lawrence Family Health Center	Robert Ingala, 1 Griffin Brook Drive, Suite 101, Methuen, MA 01844	Andover North Andover facility renov/expansion	\$ 75,500.00
Merrimack Valley YMCA	Stephen Ives, Pres/CEO 101 Amesbury Street, 4th fl., Lawrence MA 01840	Educational outreach Lawrence schools	\$ 17,500.00
Addison Gallery of American Art	Susannah Abbott, Dir., of Devel, 180 Main @ Phillips Academy Andover, MA 01810	Inner City Scholarship Fund -Lawrence students	\$ 12,000.00
Catholic Schools Foundation	Michael B. Reardon, Executive Dir., 260 Franklin St., Suite 630, Boston, MA 02110	Social Services program	\$ 8,000.00
Geiger, Jeanne Criss Center	Suzanne Dubus, CEO, 2 Harris St., Newburyport, MA 01950	Simulation & Team Training Lab construction	\$ 20,000.00
Lawrence General Hospital	Nick Zaharvas, VP Marketing, PO Box 189, Lawrence, MA 01842	Dream Garden adjacent to Adult Day & Alzheimer Ctr	\$ 7,500.00
Nevins Family of Services	Joyce Shannon, CEO, 10-12 Ingalls Court, Methuen, MA 01844	sponsored visits program - Lawrence & Lowell Children	\$ 8,000.00
Boston Children's Museum	Carole Charnow, Pres/CEO, 308 Congress Street, Boston, MA 02210	programming & operating support	\$ 25,000.00
Essex Art Center	Leslie Costello, Exec. Director, 56 Island St., Lawrence MA 01840	expand educational initiatives at Lawrence branch	\$ 9,000.00
MV YMCA - Lawrence branch	Stephen Ives, Pres/CEO 101 Amesbury Street, 4th fl., Lawrence MA 01840	School visits & traveling Science, Lawrence & Lowell	\$ 4,000.00
Museum of Science	Amy O'Donohy, Advance Officer, Science Park, Boston, MA 02114-1099	free & reduced admissions prog., Lawrence & Lowell schoolchildren	\$ 10,000.00
Old Sturbridge Village	James O'Donohue, Pres/CEO, 1 Sturbridge Village Road, Sturbridge, MA 01566	Lawrence programming @ Esperanza & YMCA	\$ 15,000.00
After School Partners	Cindy Weiner, Executive Dir., 342 A Boylston St., Netwon, MA 02459	Key to Degrees program for Lawrence students	\$ 7,500.00
Endicott College	Richard Wylie, Pres., 376 Hale St., Beverly, MA 01915	programming in Lawrence & Lowell	\$ 45,000.00
Jumpstart for Young Children	Sarah Baliga, Devel. Manager, 308 Congress St., 6th fl., Boston, MA 02210	reduced admissions/classroom visits Lawrence school children	\$ 50,000.00
Notre Dame Cristo Rey High School	Sister Mary Murphy, Pres., 303 Haverhill St., Lawrence, MA 01840	capital Expanding the Impact of Boston's Island Classroom campaign	\$ 1,500.00
Plymouth Plantation	Ellie Donovan, Exec. Dir. PO Box 1620, Plymouth MA 02362	reduced admissions program for Lawrence & Lowell kids	\$ 5,000.00
Thompson Island Outward Bound Education Center	Arthur Pearson, Pres., PO Box 127, Boston, MA 02127	operating support	\$ 2,500.00
West Parish Garden Cemetery	Lynne Capozzi, Pres. of Board, 129 Reservation Rd., Andover, MA 01810	Operating support	\$ 500.00
New England Aquarium	Katy Roberts, Manager of Found. Rel., Central Wharf, Boston, MA 02110-3399	Operating support	\$ 100.00
Lawrence Community Works	Jessica Andors, Exec. Dir., 168 Newbury St., Lawrence, MA 01841	Operating support	\$ 250.00
Boston Children's Museum	Carole Charnow, Pres/CEO, 308 Congress Street, Boston, MA 02210	Operating support	\$ 250.00
Bowdoin College	Carole Charnow, Pres/CEO, 308 Congress Street, Boston, MA 02210	Operating support	\$ 100.00
Pike School	4100 College Station, Brunswick, ME 04011-8432	Operating support	\$ 100.00
English Speaking Union (The)	34 Sunset Rock Rd., Andover, MA 01810	Operating support	\$ 100.00
Brush Schools & Univ Foundation	144 East 39th Street, NY NY 10016	Operating support	\$ 250.00
Trinity Church	575 Madison Ave., Suite 1006, NY NY 10022-2511	Operating support	\$ 250.00
Chatham Conservation Foundation	206 Clarendon Street, Boston, MA 02116-3722	Operating support	\$ 100.00
Friends of Pleasant Bay	PO Box 1243, Harwich, MA 02645	Operating support	\$ 100.00
Friends of Chatham Waterways	PO Box 472, Chatham, MA 02633-0472	Operating support	\$ 100.00
Chatham Historical Society	PO Box 709, Chatham, MA 02633	Operating support	\$ 100.00
American Cancer Society	30 Speen Street, Framingham, MA 01701	Operating support	\$ 100.00
Alzheimer's Association	480 Pleasant Street, Watertown, MA 02472	Operating support	\$ 100.00
Friends of Nahant Public Library	PO Box 76, Nahant, MA 01908-0076	Operating support	\$ 250.00
Cambodian Arts & Scholarship Foundation	PO Box 18186, Portland, ME 04112	Operating support	\$ 100.00
Nahant Preservation Trust	PO Box 30, Nahant, MA 01908	Operating support	\$ 250.00
WBUR	PO Box 9235, Chelsea, MA 02150-9235	Operating support	\$ 100.00
Gr. Lawrence Community Boating Program	Jed Koehler, Exec. Dir., PO Box 955, Lawrence, MA 01842	Operating support	\$ 2,500.00
Tabor Academy	66 Spring Street, Marion, MA 02738	Operating support	\$ 2,500.00
Nahant Preservation Trust	PO Box 30, Nahant, MA 01908	Operating support	\$ 5,000.00
Trinity Church	206 Clarendon Street, Boston, MA 02116-3722	Operating support	\$ 2,500.00
Cambodian Arts & Scholarship Foundation	Post Office Box 18186, Portland, ME 04112	Operating support	\$ 1,000.00
Chatham Marconi Maritime Center	Charles Bartlett, PO Box 421, North Chatham, MA 02650	Operating support	\$ 1,000.00
Seven & Eight Park Street Foundation	66 Spring Street, Marion, MA 02738	Operating support	\$ 2,000.00
American Textile History Museum	8 Park Street, Boston, MA 02108	Operating support	\$ 1,200.00
Nahant Village Church	491 Dutton Street, Lowell MA 01854	Operating support	\$ 1,200.00
Windrush Farm	PO Box 77, Nahant, MA 01908	Operating support	\$ 1,200.00
Elevated Thought Foundation	30 Brookview Road, Buxford, MA 01921	Operating support	\$ 1,200.00
ECF Peggy Corbett Fund	Lester Sydney, 22 Heather Dr., Methuen, MA 01844	Operating support	\$ 1,200.00
	175 Andover Street, Ste 101, Danvers, MA 01923	Operating support	\$ 1,200.00

Name of Recipient	Address of Recipient	Purpose of Grant	Amount
Beyond Soccer	Stephanie McArdle, 60 Island Street, Lawrence, MA 01840	Operating support	\$ 1,200.00
Open Door, The	Julie LaFontaine, 28 Emerson Ave., Gloucester, MA 01930	Operating support	\$ 2,500.00
Merrimack Valley Habitat for Humanity	60 Island Street, Lawrence, MA 01840	Operating support	\$ 5,000.00
American Textile History Museum	Jonathan Stevens, President, 491 Dutton St., Lowell, MA 01854	split pay w/MS (60k)-ops & Lawrence Schls. Programming	\$ 55,000.00
Groundwork Lawrence	Heather McMann, ED, 60 Island St., Lawrence, MA 01840	emergency funding-staff for educ Progs	\$ 15,000.00
Merrimack Valley Habitat for Humanity	Sharon Mason, Dir of Devel, 60 Island St., 2nd fl East, Lawrence, MA 01840	purchase building lot in Lawrence	\$ 25,000.00
U Aspire	Gabrielle King Morse, MA ED, 31 St James St., Site 520, Boston, MA 02116	operating for Lawrence programming	\$ 7,500.00
Greater Lawrence Family Health Center	Robert Ingala, CEO, 1 Griffin Brook Drive, Suite 101, Methuen, MA 01844	renov of Haverhill St Lawrence clinic-early pay of 2014 commit	\$ 50,000.00
Merrimack Valley Hospice House	John Albert CEO, 360 Merrimack Street - Bldg 9, Lawrence, MA 01843	expansion - Haverhill Hospice House-early pay of 2014 commit	\$ 50,000.00
Boys & Girls Club of Greater Haverhill	Brian Therrien ED, 55 Emerson St., Haverhill, MA 01830	Pathways to Success program support	\$ 3,000.00
Creative Living	PO Box 3177, Andover, MA 01810	website update & redesign	\$ 4,468.00
Groundwork Lawrence	Heather McMann, ED, 60 Island St., Lawrence, MA 01840	operating support	\$ 35,000.00
ECCF-Lawrence Public Schls Recovership & Turnaround	175 Andover St., Site 101, Danvers, MA 01923	Receivership & turnaround support - Lawrence Schools	\$ 40,000.00
New Profit, Inc FBO Playworks Education Energized	29 Germania St., Boston, MA 02140	Lawrence programming support	\$ 15,000.00
Bread & Roses, Inc	Robert Lantoni, ED, 58 Newbury St., Lawrence, MA 01840	operating support	\$ 22,000.00
Essex County Greenbelt Association	Ed Becker, ED, 82 Eastern Avenue, Essex MA 01929	Phase III of Land Conservation Outreach Initiative	\$ 13,000.00
Handel & Haydn Society	Trevor Pollack, Assoc Dir Instt Giving, 300 Mass Ave., Boston, MA 02115	Lawrence educational outreach & programming	\$ 5,500.00
		Total Grants paid during 2013	\$ 1,305,468.00

ABBOT AND DOROTHY H STEVENS FOUNDATION			
ATTACHMENT TO 2013 FORM 990-PF, PART XV, 3B			
GRANTS APPROVED FOR FUTURE PAYMENT			
AS OF DECEMBER 31, 2013			
	YEAR	TOTAL	PAYABLE
ORGANIZATION	MADE	PLEDGE	12 31.13
Associated Grant Makers	2013	5,350	5,350
Essex County Community Foundation	2012	35,000	15,000
Prep at Pingree	2013	30,000	20,000
Merrimack Valley YMCA	2011	375,000	225,000
Lawrence Community Works	2013	35,000	35,000
		480,350	300,350
NOTE: ALL GRANTS ARE PAID TO UNRELATED 501C(3) ORGANIZATIONS. THE ADDRESSES OF THE RECIPIENTS AND CHARITABLE PURPOSE OF THE GRANTS ARE ON FILE AND AVAILABLE UPON REQUEST			

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 ☒
- 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
	ABBOT & DOROTHY H. STEVENS FOUNDATION	04-6107991
	Number, street, and room or suite no. If a P.O. box, see instructions.	Social security number (SSN)
File by the due date for filing your return. See instructions.	P.O. BOX 111	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	NORTH ANDOVER, MA 01845	

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

JOSHUA L. MINER

- The books are in the care of ► **P.O. BOX 111 - NORTH ANDOVER, MA 01845**

Telephone No. ► **978-688-7211**

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	\$	36505.
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	\$	33505.
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	\$	3000.

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.