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EXTENSIONS GRANTED THROUGH 11/17/14

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 090-PF and its separate instructions is abuse, irs gov/form990pf.

OMB No 1545-0052

Depa	rtment	t of the Treasury	Do not enter S Information about For	ocial Security numbers or n 1990-PF and its separate	n this form a c instruction	s it may be n s is atomom.ù	nade public rs <i>gov/lorm990pf.</i>	Open to Public Inspection
		dar year 2013 or tax year b		11 050-77 AND 1073-1241616	, and e		V. House Manager	
Nar	ne of	foundation					A Employer Identification	number
		.R. BARKER FO	OUNDATION				, ,	
С	/0	BALLENTINE I	PARTNERS, L	LC			13-6268289	
		nd street (or PO box number if n				Room/sulte	B Telephone number	
2	30	3RD AVENUE,	6TH FLOOR				(781) 314-	1300
		THAM, MA 024		ostal code			C if exemption application is pe	nding, check here
			nitial return	Initial return of a fo	ormer public o	charity	D 1. Foreign organizations,	. check here
			inal return	Amended return		•		••••
		X	Address change	Name change			Foreign organizations mee check here and attach con	nputation
H	heck			empt private foundation			E If private foundation state	
] Se	ction 4947(a)(1) nonexempt		Other taxable private founds	ation		under section 507(b)(1)(
I Fa		rket value of all assets at en		ng method Cash	X Acc	rual	F If the foundation is in a 6	O-month termination
(fr	om F	Part II, col. (c), line 16)		her (specify)			under section 507(b)(1)(
>	\$	71,562,		mn (d) must be on cash i	basis.)			
PE	n I	Analysis of Revenue and (The total of amounts in column necessarily equal the amounts	Expenses ns (b), (c), and (d) may not in column (a))	(a) Revenue and expenses per books		vestment ome	(c) Adjusted net income	(d) Disbursements for chantable purposes (cash basis only)
	1	Contributions, gifts, grants,			() " Will "	4882	N/A N/A	4778673653
	2	Check ► X If the foundation is			The second	July 28 12 1		
	3	Interest on savings and tempora cash investments	ury	280,023.	28	0,023.		STATEMENT 1
	4	Dividends and interest from		934,425.		4,425.		STATEMENT 2
	5a							W. 14.2 V. J. C.
		Net rental income or (loss)						
•	l _	Nat gain or (loss) from sale of as	sets not on line 10	4,733,337.	N 1987 (No. 1)		\$\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\	
ž	ь	Gross sales price for all assets on line 6a	3,670,546.			# (\$1.50 F)	(2) 1986(北美·苏南	
Revenue	7	Capital gain net income (from Pa	art IV, line 2)	May Make Shirt Same	4,73	3,337.		
ď	8	Net short-term capital gain			X 18 18 18 18 18 18 18 18 18 18 18 18 18			
	g	Income modifications		3.2.30 m. 1880 m.	JY 1886 C. J. J. S. S.	Juny :		
	10a	Gross sales less returns and allowances		20mm 10mm 10mm 10mm 10mm 10mm 10mm 10mm		19 July 19 19 19 19 19 19 19 19 19 19 19 19 19		
	b	Less Cost of goods sold			1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1			
	ε	Gross profit or (loss)						
	11	Other income		<1,600.		1,600.		STATEMENT 3
	12	Total. Add lines 1 through	11,	5,946,185.		6,185.		A STATE OF THE STA
	13	Compensation of officers, direct		125,000.	6	2,500.		62,500.
	14	Other employee salaries and				, m. , , ,		
S	15	Pension plans, employee be		10 252		2 051		0 303
nses	16a	Accounting leas Other professional fees	STMT 4	10,253.		$\frac{2,051}{0.337}$		8,202.
Expe	<u>_</u> b	Accounting leas	STMT 5	46,136.	-	9,227.		36,909.
யி	35	Other professional fees	O. STMT 6	103,206.		0,641.		82,565.
.≩`	777	Interest 2014	COMMO 7	158,334.		6,578.		4,545.
Operating and Administrati	10	W. L. W.	STMT 7	130,334.		0,370.		7,545.
\ <u>.</u>	13	dapreciation and daptetion Occupancy						8 20 6 5 6 20 5 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
, à	20							
β	21 ^e	Travel, conferences, and m Punting and publications						
ä		-/2	~	298,072.	25	9,007.		39,066.
į		Other expenses			<u> </u>	, <u>, , , , , , , , , , , , , , , , , , </u>		
)era		expenses. Add lines 13 thr		741,001.	38	0,004.		233,787.
ŏ	25	Contributions, gifts, grants						2,409,204.
		Total expenses and disbur	•	, , , , , , , , , , , , , , , , , , ,	· · · · · · · · · · · · · · · · · · ·			
	-	Add lines 24 and 25		3,642,501.	38	0,004.]	2,642,991.
	27	Subtract line 26 from line 1		24、11後分。11年5日	\$ 1 2 KG	5" OT 1"	Wall Solar Jak	14 July 200 1
		Excess of revenue over expense		2,303,684.			1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1	5 - May 10 - May 25
	1	Net investment income (if r		36 45 - 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	5,56	6,181.	表现 生成物主义	
	ε	Adjusted net income (if neg			7 1	1 1/3/1/2		
3235 10-10		LHA For Paperwork Rec		instructions.				Form 990-PF (2013)

Fo	rm 99	0-PF(2013) C/O BALLENTINE PARTNERS	, LLC	13-	6268289 Page 2
1.0		Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End o	
	art	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing	249,005.		
	2		5,380,804.		
	3	Accounts receivable			
		Less allowance for doubtful accounts			
	4	Pledges receivable ►	TO COLUMN TO COLUMN	3 4 - 1 0 mill 3 4 m 6 Kin	· · · · · · · · · · · · · · · · · · ·
	l	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		\$ 30 mm 1 m	in the sale of the
	1	Less allowance for doubtful accounts			
şş	8	Inventories for sale or use			
Assets		Prepaid expenses and deferred charges	80,427.	32,618.	
٩		Investments - U S and state government obligations STMT 11	8,992,013.		
		Investments - corporate stock	11,791,977.	11,630,188.	11,630,188.
		Investments - corporate bonds			
	11	investments - land, buildings, and equipment basis	[[] 第 3 29 20 20 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5		
	Į	Less: accumulated depreciation			
	12	Investments - mortgage loans	470 067	00 000 000	22 225 522
	13	Investments - other STMT 13		20,906,630.	
	14	Land, buildings, and equipment: basis		17. 18. 18. 18. 18. 18. 18. 18. 18. 18. 18	
		Less accumulated depreciation	22 (04 017	26 260 004	26 260 004
	1	Other assets (describe STATEMENT 14)	23,084,017.	26,269,804.	26,269,804.
	16	Total assets (to be completed by all filers - see the	71 640 210	71 560 100	71 562 100
	 _	instructions, Also, see page 1, item 1)		71,562,108.	
	1	Accounts payable and accrued expenses	31,500. 242,704.		
	18	Grants payable	242,704.	733,000.	
Liabilities	19	Deferred revenue			
Ē	20	Loans from officers, directors, trustees, and other disqualified persons		······································	
Ë	21	Mortgages and other notes payable Other liabilities (describe ► STATEMENT 15)	353,881.	364,864.	
	22	Other Habilities (describe DIATBITITY 13)	333,001.	3047004.	
	23	Total Habilities (add lines 17 through 22)	628,085.	1,158,551.	
	1	Foundations that follow SFAS 117, check here	020,000	1,130,331.	
	l	and complete lines 24 through 26 and lines 30 and 31.			
Ş	24	Unrestricted	71,020,225.	70,403,557.	
ances		Temporanly restricted			
Ba	26	Permanently restricted			
ā		Foundations that do not follow SFAS 117, check here	······································		
or Fund	1	and complete lines 27 through 31.			
S	27	Capital stock, trust principal, or current funds	}		
set	28	Paid-in or capital surplus, or land, bidg, and equipment fund			
Net Assets	29	Retained earnings, accumulated income, endowment, or other funds			
Šet	30	Total net assets or fund balances	71,020,225.	70,403,557.	
_	ĺ				
	31	Total liabilities and net assets/fund balances	71,648,310.	71,562,108.	
l'in	art	Analysis of Changes in Net Assets or Fund B	lalances		
	<i>a</i> , (-				
1		net assets or fund balances at beginning of year - Part II, column (a), line	30		
					71,020,225.
		amount from Part I, line 27a		2	2,303,684.
		increases not included in line 2 (itemize) DEFERRED TA			68,419.
		ines 1, 2, and 3		3 mm 1 0 4	73,392,328.
		eases not included in line 2 (itemize)		ATEMENT 10 5	2,988,771.
5	Total	net assets or fund balances at end of year (line 4 minus line 5) - Part II, c	olumn (b), line 30	6	70,403,557.
323	511				Form 990~PF (2013)

2-story brick wa	ribe the kind(s) of property rehouse, or common stoo	y sold (e.g., real estate, ck, 200 shs. MLC Co.)		P -	w acquired Purchase Donation	(c) Date a (mo , d		(d) Date sold (mo , day, yr)
b SEE ATTACHED	CTATEMENT			 -				
t	SIAIBHENI			-				
đ								
e								
(e) Gross sales price	(1) Depreciation allo (or allowable)		st or other basis expense of sale		,		ain or (loss) s (f) minus (
a								
<u> </u>	- <u>-</u>							
6 d			<u></u>	-				
474,248.								4,733,337
Complete only for assets showin	g gain in column (h) and	owned by the foundation	n on 12/31/69			(I) Gains (C		
	(j) Adjusted basi		xcess of col (i)			of (k), but r	ot less than	1 -0-) ar
(i) F M V as of 12/31/69	as of 12/31/69		col (j), if any			LOSSes	(from col (n))
a								
				\perp				
G								
1								4 772 327
				.				4,733,337
Capital gain net income or (net ca	pital loss) { If gain, If (loss	, also enter in Part I, line s), enter -0- in Part I, line	7 17)	2			4,733,337
Net short-term capital gain or (los		1222(5) and (6)		7				
If gain, also enter in Part I, line 8,				•	,		N/A	
If (loss), enter -0- in Part I, line 8				, ,				
or optional use by domestic private	nder Section 494 foundations subject to the	0(e) for Reduced				come		
or optional use by domestic private section 4940(d)(2) applies, leave the foundation liable for the sect "Yes," the foundation does not qual	nder Section 494 foundations subject to the his part blank ion 4942 tax on the distribity under section 4940(e).	O(e) for Reduced to section 4940(a) tax or butable amount of any y	n net investment in ear in the base per art.	riod?				
or optional use by domestic private section 4940(d)(2) applies, leave the foundation liable for the sect "Yes," the foundation does not qual Enter the appropriate amount in e	nder Section 494 foundations subject to the his part blank ion 4942 tax on the distribity under section 4940(e).	O(e) for Reduced to section 4940(a) tax or butable amount of any y Do not complete this port, see the instructions be	n net investment in ear in the base per art.	riod?			-44>>>>	Yes X No
or optional use by domestic private section 4940(d)(2) applies, leave the section 4940(d)(2) applies, leave the section 4940(d)(2) applies, leave the section does not qual Enter the appropriate amount in each (a). Base period years Calendar year (or tax year beginnling)	foundations subject to the distribution 4942 tax on the distribution 4940(e).	O(e) for Reduced the section 4940(a) tax or the section 4940(b) allifying distributions	n net investment in ear in the base per art.	riod? ntries. (c)	able-use asse	ts	Distrib	Yes X No (d) ulion ratio ided by col (c))
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or optional use by domestic private section 4940(d)(2) applies, leave the fast the foundation liable for the sect "Yes," the foundation does not qual. Enter the appropriate amount in each gap Base period years. Calendar year (or tax year beginning 2012 2011 2010	foundations subject to the distribution 4942 tax on the distribution 4940(e).	o(e) for Reduced the section 4940(a) tax of tax of the section 4940(a) tax of the section 4940(a) tax of	ear in the base per art. ifore making any e	riod? ntries. (c) ncharit 70, 63,	able-use asse 301,84 941,31 904,10	ts 0 . 8 . 5 . 0 .	Distrib	Yes X No
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Base period years Calendar year (or tax year beginnly 2012 2011 2010 2009 2008 Total of line 1, column (d)	foundations subject to the distribution 4942 tax on the distribution 4942 tax on the distribution 4940 (e). The distribution 4940 (e). The distribution 4940 (e). The distribution and the distribution and the distribution are distribution as a second subject of the distribution and the distribution are distribution as a second subject of the distribution and the distribution are distribution as a second subject of the distribution and the distribution are distribution as a second subject to the distribution and the distribution are distribution as a second subject to the distribution and the distribution are distribution as a second subject to the distribution and the distribution are distribution as a second subject to the distribution and the distribution are distribution as a second subject to the distribution and the distribution and the distribution are distribution as a second subject to the distribution and the distribution are distribution as a second subject to the distribution and the distribution are distribution as a second subject to the distribution and the distribution are distribution as a second subject to the distribution and the distribution are distribution as a second subject to the distribution and the distribution are distribution as a second subject to the distribution and the distribution are distribution as a second subject to the distribution and the distribution are distribution as a second subject to the distribution and the distribution are distribution as a second subject to the distribution and the distribution are distribution as a second subject to the distribution and the distribution are distribution as a second subject to the distribution are distribution as a second subject to the distribution and the distribution are distribution as a second subject to the distribution and the distribution are distribution as a second subject to the distribution and the distribution are distribution as a second subject to the distribution and distribution are distribution as a second subjec	o(e) for Reduced the section 4940(a) tax of tax of the section 4940(a) tax	n net investment in ear in the base per art. Net value of no	ntries. (c) ncharit 70, 63, 56,	able-use asse 301,84 941,31 904,10 048,51 068,22	ts 0.8.5.0.8.3.4.5.6.7	Distrib (col (b) div	(d) Yes X No value (d) Value (c) (c) 04115 04161 03954 05681

J.M.R. BARKER FOUNDATION

Forn	990-PF (2013) C/O BALLENTINE PARTNERS, LLC 13-626	
	int VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - sec	instructions)
1a	Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1	14444
	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 and enter 1%	111,324.
	of Part I, line 27b	
C	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)	
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	0.
3	Add lines 1 and 2	111,324.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	0.
5	Tax based on Investment Income. Subtract line 4 from line 3 If zero or less, enter -0-	111,324.
6	Credits/Payments Credits/Payments	Service Sales
	2013 estimated tax payments and 2012 overpayment credited to 2013 6a 165,979.	
	Exempt foreign organizations - tax withheld at source	
	Tax paid with application for extension of time to file (Form 8868)	
	Backup withholding erroneously withheld 6d 6d	
	Total credits and payments Add lines 6a through 6d	ĨĨĜ5, 979.
8	Enter any penalty for underpayment of estimated tax. Check here X if Form 2220 is attached	888.
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	
_	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	53,767.
10		0.
11	Enter the amount of line 10 to be: Credited to 2014 estimated tax ► 53, 767 - Refunded ► 11	
	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in	Yes No
14		
	any political campaign?	" V
U	If the answer is "Yes" to 1 _a or 1 _b , attach a detailed description of the activities and copies of any materials published or	
		1.3 % 10.39
	distributed by the foundation in connection with the activities.	1c X
	Did the foundation file Form 1120-POL for this year?	" 16 17 17 17 17 17 17 17
a	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year. (1) On the foundation \$\infty\$ \$\inf	
	(1) 011 (10 10 10 10 10 10 10 10 10 10 10 10 10 1	
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation	
_	managers > \$ 0.	2 X
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	· 2 X
_	If "Yes," attach a detailed description of the activities.	
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	
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	• +
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?	5 X
	If "Yes," attach the statement required by General Instruction T	
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	ENGRET SPORT
	remain in the governing instrument?	
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	. 7 X
	_	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)	- 医海毒素素
	NY, MA	- MARS
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)	1 4 8 1 2 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
	of each state as required by General Instruction G? If "No," attach explanation	, 8b 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	· 38 0.22 0.22
	year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV	9 X
10	Did any persons become substantial contributors during the tax year? If "Yea," which is schedule listing their names and audresses	

J.M.R. BARKER FOUNDATION

	J.M.R. BARRER FOUNDATION				
Form	990-PF(2013) C/O BALLENTINE PARTNERS, LLC	13-6268	<u> 289</u>		Page 5
Pε	rt.VIJ-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 p	rivileges?			
	If "Yes," attach statement (see instructions)		12		X
13	Did the foundation compty with the public inspection requirements for its annual returns and exemption application?		13	Х	
	Website address ► N/A				
14	The books are in care of ▶ C/O BALLENTINE PARTNERS, LLC Telephone no	► (781)	314	-13	00
	Located at ▶ 230 3RD AVENUE, 6TH FLOOR, WALTHAM, MA	ZIP+4 ▶02	451		
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		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,			Yes	No
. •	securities, or other financial account in a foreign country?		16	-	Х
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign	******** 14 1	188 3	1	(Y.S.)
	country		*130		12.
Pa	nt VII-B Statements Regarding Activities for Which Form 4720 May Be Required		<u> </u>	***************************************	
<u> </u>	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		1.30	Yes	No
1 2	During the year did the foundation (either directly or indirectly)		\$ July 2	2 - 2 646	77 T. 3.
•		es X No	3790		\$
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)				33, 3
		es X No	(O) (3 () (4 (3)		
	a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?		1982 P		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?		2 3	99. N Kosa	S. (3)
	(5) Transfer any income or assets to a disqualified person (or make any of either available	,a <u>L.</u>			1
	, n	es X No	1 1 2		
	, and a second of the second o	is Tar HO			
	(6) Agree to pay money or property to a government official? (Exception. Check "No"		1.000		
	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)	oo 🔽 No	1 1		
		S TV IND		2.9%	
D	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations			कें.केंद्रकें	X
	section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?		1b	887E3	A 3000
	Organizations relying on a current notice regarding disaster assistance check here		3 4 //		
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		1. 100	143.00	range and the
	before the first day of the tax year beginning in 2013?		10	22500 C	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))		3.		
а	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		270		
		es X No	C. L. C.		- 25
	If "Yes," list the years ▶				2/2/
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			1 6 60	
	valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach		, din	100	200
	statement - see instructions)	N/A	2b	EC 322	N13800
C	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.		1 3	1987. 2 - 1882.	
	<u> </u>		1334	1.3/4.6	
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time	رحص	3 (A) 20 (S)	\$ \J	
		es X No	13.8	14 400	
þ	If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons af			1 E	
	May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to d			1	18 4
	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			77/2	W.S
	Form 4720, to determine if the foundation had excess business holdings in 2013.)		3ъ		
	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 purpositions.			- 1	in the
	had not been removed from jeopardy before the first day of the tax year beginning in 2013?	<u> </u>	4b		<u>X</u>

J.M.R. BARKER FOUNDATION					
			13-62682	89	Page 6
Form 990-PF (2013) C/O BALLENTINE PARTNERS, [Part: VII-B] Statements Regarding Activities for Which F					Paye o
5a During the year did the foundation pay or incur any amount to	Om The May Bo 1	toquit ou (comm	- F	198 179	1990
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	4045(a)\2	[] v,	se [X]No [§		175.W.
(2) Influence the outcome of any specific public election (see section 4955), o					100 mg
any voter registration drive?	r to carry on, unecesy or muni	rcily,	se [X] No		
any voter registration drive?	,,,, ,, ,,,,, ,, ,, ,,,,,,,,,,,,,,,,,,	·······:::';;	s X No	100	1
		۱۲ لستا ۱۰۰۰			
(4) Provide a grant to an organization other than a charitable, etc., organization		[[V] No. [8		
509(a)(1), (2), or (3), or section 4940(d)(2)?					
(5) Provide for any purpose other than religious, charitable, scientific, literary,			s X No		
the prevention of cruelty to children or animals?			S LALINU J.		10 m
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und			NI/A	5b	[* ·
section 53 4945 or in a current notice regarding disaster assistance (see instru	cuons)/	** ** *** ***		A 0 0.A.	705 70
Organizations relying on a current notice regarding disaster assistance check h			[]		営る
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fr			es 🗀 No		123
expenditure responsibility for the grant?	•	/A.,1	מאוב אנ		警 三
If "Yes," attach the statement required by Regulations section 53 4945					∀ (3)
6a Did the foundation, during the year, receive any funds, directly or indirectly, to		[. VINA		1300 (N)
a personal benefit contract?	are and handful contract?		טאונאט אי	Rh (S)	X
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p If "Yes" to 6b, file Form 8870	ersonal benefit contract?	- ***** *** ***		3100	14.3
7a At any time during the tax year, was the foundation a party to a prohibited tax s	holter transaction?		s X No		
b if "Yes," did the foundation receive any proceeds or have any net income attribu	toble to the transaction?		N/A	7b	1-23
Part VIII Information About Officers, Directors, Trusto	es Foundation Ma	nagers Highly			
Paid Employees, and Contractors	ees, i oundation me	magers, ingm			
1 List all officers, directors, trustees, foundation managers and their	compensation.				
	(b) Title, and average	(c) Compensation	(d) Contributions to employee benefit plans and detempt	(e) Exp	
(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	and deterred compensation	account allowa	
SEE STATEMENT 16		125,000.	0.		0.
		•			
		<u> </u>			
		L		<u> </u>	
]			
			<u></u> _	<u> </u>	
2 Compensation of five highest-paid employees (other than those inc		enter "NONE."	(d) Contributions to	(a) Evr	
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week	(c) Compensation	employee benefit plans and deferred	(e) Exp	, other
NOVE	devoted to position		compensation	allowa	nces
NONE		!			
				 	
				 	
		 		 	
	i	,			

Form **990-PF** (2013)

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

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All other program-related investments. See instructions

Total. Add lines 1 through 3

C/O BALLENTINE PARTNERS, LLC

P	Minimum Investment Return (All domestic foundations must complete this part. Foreign fou	ndations	, see instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes	Aller S	
а	Average monthly fair market value of securities	1a	65,915,117.
b	Average of monthly cash balances	1b	65,915,117. 5,751,304.
£	Fair market value of all other assets	10	
d	Total (add lines 1a, b, and c)	10	71,666,421.
_	Reduction claimed for blockage or other factors reported on lines 1a and	53833	
·	1c (attach detailed explanation) 1e 0 .	3.40 A	
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	71,666,421.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	1,074,996.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	70,591,425.
6	Minimum Investment return. Enter 5% of line 5	6	3,529,571.
P	art XI Distributable Amount (see instructions) (Section 4942(1)(3) and (j)(5) private operating foundations ar	id certain	
	foreign organizations check here and do not complete this part)		
1	Minimum investment return from Part X, line 6	1	3,529,571.
2a	Tax on investment income for 2013 from Part VI, line 5		
b	Income tax for 2013 (This does not include the tax from Part VI)2b		
C	Add lines 2a and 2b	2¢	111,324.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	111,324. 3,418,247.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	3,418,247.
6	Deduction from distributable amount (see instructions)	В	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	3,418,247.
P	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
а	Expenses, contributions, gifts, etc - total from Part I, column (d), line 26	1a	2,642,991.
b	Program-related investments - total from Part IX-B	16	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		
а	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	2,642,991.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		
	income. Enter 1% of Part 1, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	2,642,991.
	Note The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation 4940(e) reduction of tax in those years	qualities f	or the section
	TO TO LOT TO COLOT OF LOAD IT BEIODO YOURS		Form 990-PF (2013)

Page 9

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				3,418,247.
2 Undistributed income, if any, as of the end of 2013	A 3/2 14 15 16 16 16 16 16 16 16 16 16 16 16 16 16			
a Enter amount for 2012 only			2,442,125.	Spice and Company of the San
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2013.		TO GO TO THE TO THE STATE OF		
a From 2008				
b From 2009				
c From 2010			**************************************	
4 From 2011				
e From 2012				
f Total of lines 3a through e	0.	A STATE OF THE STA		AND THE PROPERTY OF THE PARTY O
4 Qualifying distributions for 2013 from				
Part XII, line 4 \triangleright \$ 2,642,991.				
a Applied to 2012, but not more than line 2a			2,442,125.	344
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.			7-12/16/2019 20 20 20 20 20 20 20 20 20 20 20 20 20
d Applied to 2013 distributable amount			27 (12 (14 (14 (14 (14 (14 (14 (14 (14 (14 (14	200,866.
e Remaining amount distributed out of corpus	0.	THE WAY ON THE		
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.	1980 1980 1980 1980 1980 1980 1980 1980		
b Prior years' undistributed income, Subtract				
line 4b from line 2b	All the state of t	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	From State State State State	0.		
e Undistributed income for 2012. Subtract line				
4a from line 2a Taxable amount - see instr	(2) (3) (4) (4) (4) (4) (4) (4) (4) (4) (4) (4	19. 24 m 10. 3 m 2 m	0.	
1 Undistributed income for 2013 Subtract				5 9
lines 4d and 5 from line 1. This amount must		经验证 例的表示。		2 217 201
be distributed in 2014	103-30.30 . 31 . 32 . 32 . 32 . 32 . 32 . 32 . 32	62 4 20 46 47 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	100 1 10 10 10 10 10 10 10 10 10 10 10 1	3,217,381.
7 Amounts treated as distributions out of			RESERVED TO THE SECOND OF THE	
corpus to satisfy requirements imposed by	0.			
section 170(b)(1)(F) or 4942(g)(3)	<u> </u>		1 1 2 1 2 1 2 1 2 1 2 1 2 1 2 1 2 1 2 1	
8 Excess distributions carryover from 2008	0.			
not applied on line 5 or line 7				N 412/ 1/28 (20) 28 (20)
9 Excess distributions carryover to 2014	0.			
Subtract lines 7 and 8 from line 6a	778 4 4 7 c 8 8 8 5 7 -	123 1 25 3 2 3 2 3 3 3 3 3 3 3 3 3 3 3 3 3 3		M 18 38 8 8 8 8 8
O Analysis of line 9 a Excess from 2009				
b Excess from 2010		San	STATE OF THE STATE	
c Excess from 2011	W. 2. 5 3 3 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		The state of the s	
d Excess from 2012				以下"多数"。"我们"
e Excess from 2013 .		1、直接强烈的代表	# 12 d 12 d 2 d 12 d	
e Endeas Hom 2019 .	1000000 250 050	1 3/1.	h	Form 990-PF (2013)

b The form in which applications should be submitted and information and materials they should include

c Any submission deadlines

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

Form 990-PF (2013)

C/O BALLENTINE PARTNERS, LLC

| Part XV. | Supplementary Information (continued) Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Foundation Purpose of grant or show any relationship to Amount contribution status of any foundation manager Name and address (home or business) recipient or substantial contributor a Paid during the year PUBLIC CHARITY OPERATING SUPPORT AMAZON CONSERVATION TEAM NONE 4211 FAIRFAX DRIVE ARLINGTON, VA 22203 100,000. APPALACHIAN MOUNTAIN CLUB NONE PUBLIC CHARITY GENERAL SUPPORT 5 JOY STREET 55,000. BOSTON, MA 02108 NONE PUBLIC CHARITY BENERAL SUPPORT & AUSTIN PARTNERS IN EDUCATION 1601 RIO GRANDE STREET #300A SPECIAL PROJECTS 50,000. AUSTIN, TX 78701 PUBLIC CHARITY GENERAL SUPPORT BOSTON LYRIC OPERA NONE 11 AVE DE LAFAYETTE 260,000. BOSTON, MA 02111 PUBLIC CHARITY GENERAL SUPPORT BRATTLEBORO MEMORIAL HOSPITAL NONE 17 BELMONT AVENUE 350,000. BRATTLEBORO VT 05301 SEE CONTINUATION SHEET (S) ≥ 3a 2,409,204. b Approved for future payment PUBLIC CHARITY OPERATING SUPPORT CONCERNED CITIZENS OF MONTAUK NONE PO BOX 915 50,000. MONTAUR, NY 11954 GLOUCESTER EDUCATION FOUNDATION: BAY PUBLIC CHARITY GENERAL SUPPORT NONE STATE READING 122 MAIN STREET GLOUCESTER MA 01930 60,000. NORTHFIELD MOUNT HERMON SCHOOL PUBLIC CHARITY SPECIAL PROJECT NONE ONE LAMPLIGHTER WAY NORTHFIELD, MA 01354 25,000. SEE CONTINUATION SHEET(S) 735,000. Total

323611 10-10-13

^{**} SEE PURPOSE OF GRANT CONTINUATIONS

Form 990-PF (201

	· · · · ·			
13)	C/0	BALLENTINE	PARTNERS,	LLC

1 Program service revenue. a Business Amount code Amount function b C C C C C C C C C C C C C C C C C C	ross amounts unless otherwise indicated.	Unrelate	ed business income		sted by section 512, 513, or 514	(8)
a b c d g Fees and contracts from government agencies 2 Membership dues and assessments 3 Interest on savings and temporary cash investments 4 Dividends and interest from securities 5 Net rental income or (loss) from real estate a Debt-financed property b Not debt-financed property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory 11 other revenue: 8 Gain or (loss) from sales of inventory 11 other revenue: 12 Subtotal Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) 15 Relationship of Activities to the Accomplishment of Exempt Purposes Line No. Explain below how sech activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of	В	Business		slon	• •	Related or exempt function income
b c c d d d d d d d d d d d d d d d d d		C008		COO O		12.10.10.11.10.10.10
Fees and contracts from government agencies 2 Membership dues and assessments 3 Interest on savings and temporary cash investments 4 Dividends and interest from securities 5 Net rental income or (loss) from real estate a Debt-financed property b Not debt-financed property c Not rental income or (loss) from personal property b Not cell-financed property c Noter investment income 3 Gain or (loss) from sales of assets other than inventory 18 Q Gross profit or (loss) from special events 0 Gross profit or (loss) from sales of inventory 1 Other revenue: 3 b c d d e e Subtotal Add columns (b), (d), and (e) 9 5, 946, 185. 3 Total. Add line 12, columns (b), (d), and (e) 9 5, 946, 185. 3 Total. Add line 12, columns (b), (d), and (e) 9 5, 946, 185. Total instructions to verify calculations.) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of				+		
d e grees and contracts from government agencies 2 2 Membership dues and assessments 3 3 Interest on savings and temporary cash investments 14 280 , 023 . 4 Dividends and interest from securities 14 934 , 425 . 5 Net rental income or (loss) from real estate a Debt-financed property . 6 Net rental income or (loss) from personal property . 6 Net rental income or (loss) from personal property . 7 Other investment income 8 dain or (loss) from sales of assets other than inventory . 9 Net income or (loss) from special events . 0 Gross profit or (loss) from sales of inventory . 10 Other revenue: 2 a b . 5 Usubtotal Add columns (b), (d), and (e)				+		
g Fees and contracts from government agencies 2 Membership dues and assassments 3 Interest on savings and temporary cash investments 4 Dividends and interest from securities 5 Net rental income or (loss) from real estate a Debt-financed property b Not debt-financed property c Not rental income or (loss) from personal property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory 1 Net income or (loss) from sales of inventory 1 Other revenue: a b c d d e 2 Subtotal Add columns (b), (d), and (e)					·	
g Fees and contracts from government agencies 2 Membership dues and assassments 3 Interest on savings and temporary cash investments 4 Dividends and interest from securities 5 Not rental income or (loss) from real estate a Debt-financed property 6 Not rental income or (loss) from personal property 7 Other investment income 8 Gain or (loss) from sales of assats other than inventory 9 Not income or (loss) from sales of inventory 10 Other revenue: a b c d d e 2 Subtotal Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) 5 See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of						
2 Membership dues and assassments 3 Interest on savings and temporary cash investments 4 Dividends and interest from securities 5 Net rental income or (loss) from real estate a Debt-financed property b Not debt-financed property 6 Net rental income or (loss) from personal property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory. 9 Net income or (loss) from special events 0 Gross profit or (loss) from sales of inventory 1 Other revenue: a b c c d e e e e e e e e e e e e e e e e e			<u> </u>	+	·	
2 Membership dues and assassments 3 Interest on savings and temporary cash investments 4 Dividends and interest from securities 5 Net rental income or (loss) from real estate a Debt-financed property b Not debt-financed property 6 Net rental income or (loss) from personal property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory. 9 Net income or (loss) from special events 0 Gross profit or (loss) from sales of inventory 1 Other revenue: a b c c d e e e e e e e e e e e e e e e e e				11		[
3 Interest on savings and temporary cash investments 4 Dividends and interest from securities 5 Net rental income or (loss) from real estate a Debt-financed property b Not debt-financed property 6 Net rental income or (loss) from personal property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory 9 Net income or (loss) from special events 0 Gross profit or (loss) from sales of inventory 1 Other revenue: a b c c d d e 2 Subtotal Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) 5 See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of				 		
Investments 4 Dividends and interest from securities 5 Net rental income or (loss) from real estate a Debt-financed property b Not debt-financed property 6 Net rental income or (loss) from personal property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory 9 Net income or (loss) from special events 0 Gross profit or (loss) from sales of inventory 1 Other revenue: a b C d d 8 Substitute Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) Total Relationship of Activities to the Accomplishment of Exempt Purposes Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of				1		
4 Dividends and interest from securities 5 Net rental income or (loss) from real estate a Debt-financed property b Not debt-financed property 6 Net rental income or (loss) from personal property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory 9 Net income or (loss) from sales of inventory 10 Other revenue: a b c d e 2 Subtotal Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) 3 Total. Add line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of	4			1 1 1	200 022	
5 Net rental income or (loss) from real estate a Debt-financed property b Not debt-financed property 6 Net rental income or (loss) from personal property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory 1 Net income or (loss) from sales of inventory 1 Other revenue: a b c d B Subtotal Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of					280,023.	
a Debt-financed property b Not debt-financed property 6 Net rental income or (loss) from personal property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory 9 Net income or (loss) from special events 0 Gross profit or (loss) from sales of inventory 1 Other revenue: a b c d d e 2 Subtotal Add columns (b), (d), and (e) 8 See worksheet in line 13 instructions to verify calculations.) Pare XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of		- 5. 44	C 2000 200 15 1802.08		934,425.	100 (A. A.C.) (10 Km - 10 Km
b Not debt-financed property 6 Net rental income or (loss) from personal property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory 9 Net income or (loss) from special events 0 Gross profit or (loss) from sales of inventory 1 Other revenue: a b c d e 2 Subtotal Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of		****	The state of the s		A STATE OF THE PARTY OF THE PAR	Charles By Brook - S. C.
6 Net rental income or (loss) from personal property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory. 9 Net income or (loss) from special events 0 Gross profit or (loss) from sales of inventory 1 Other revenue: a b c d e 2 Subtotal Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Pare XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of	· · · · · · · · · · · · · · · · · · ·		<u></u>			
property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory. 9 Net income or (loss) from special events 0 Gross profit or (loss) from sales of inventory 1 Other revenue: a b c d e 2 Subtotal Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of				1		<u> </u>
7 Other investment income 8 Gain or (loss) from sales of assets other than inventory	rental income or (loss) from personal					
8 Gain or (loss) from sales of assets other than inventory	erty		. <u> </u>	1		
than inventory				14	<1,600.	<u> </u>
9 Net income or (loss) from special events 0 Gross profit or (loss) from sales of inventory 1 Other revenue: a b c d e 2 Subtotal Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of	or (loss) from sales of assets other					
O Gross profit or (loss) from sales of inventory 1 Other revenue: a b c d e 2 Subtotal Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of	inventory			18	4,733,337.	
1 Other revenue: a b c d e 2 Subtotal Add columns (b), (d), and (e) 3 Total Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of	ncome or (loss) from special events			1	<u> </u>	
a b c d e 2 Subtotal Add columns (b), (d), and (e) 3 Total Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of	s profit or (loss) from sales of inventory			\perp		
b c d e 2 Subtotal Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of	r revenue:					
b c d e 2 Subtotal Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of						
C d e 2 Subtotal Add columns (b), (d), and (e)						
d e 12 Subtotal Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) 13 Total. Add line 13 instructions (b), (d), and (e) 14 See worksheet in line 13 instructions to verify calculations.) 15, 94 16 Part XVI-B 17 Relationship of Activities to the Accomplishment of Exempt Purposes 18 Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of						
E Subtotal Add columns (b), (d), and (e)		······				
3 Total. Add line 12, columns (b), (d), and (e)						
3 Total: Add line 12, columns (b), (d), and (e)	total Add columns (b), (d), and (e)		0		5,946,185.	0
See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of	it. Add line 12, columns (b), (d), and (e)	*** * ** -	******		13	5,946,185
Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of						
Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of	XVI-B Relationship of Activities to the	ne Acc	omplishment of E	xemp	t Purposes	
			- <u></u>			mnlichment of
				A CONTIN	oted importantly to the accor	iipiisiiiiiciit Vi

				····	· · · · · · · · · · · · · · · · · · ·	
						
						
23621 0-10-13 Form 99						Form 990-PF (201

National Committee	Exempt Organ	ilzations			
1 Did the or		rectly engage in any of the followi	ing with any other organization	n described in section 501(c) of	Yes No
the Code	(other than section 501(c	e)(3) organizations) or in section 5	527, relating to political organiz	zations?	
a Transfers	from the reporting found	lation to a noncharitable exempt o	rganization of		
(1) Cash	47 7070 h w ys j-		,, , ,,,, ,,,		1a(1) X
				,	. 1a(2) X
b Other tran					
(1) Sales	of assets to a noncharita	ible exempt organization			[1b(1)] X
					1b(2) X
		ailing lists, other assets, or paid er			1c X
-		•		ays show the fair market value of the good	
	•			in any transaction or sharing arrangemen	
	· •	other assets, or services received		,	•
(a) Line no	(b) Amount involved	(c) Name of noncharitab		(d) Description of transfers, transactions,	and sharing arrangements
		N/A			
					
		<u> </u>			
		<u> </u>			
				-	
				······································	
		<u> </u>			
					<u>.</u>
		 	<u></u>		
					
					
		 			······································
		<u> </u>	<u></u>		
in section		nedule.			Yes X No
	N/A	gamzanon	(a) 13he of oldanization	(e) Description of leads	
	IV/ A		+		· · · · · · · · · · · · · · · · · · ·
					
			 		
Sign Here		omplete Declaration of preparer (other the		statements, and to the best of my knowledge ation of which preparer has any knowledge TREASURER Title	May the IRS discuss this return with the preparer shown below (see instr)? X Yes No
	Print/Type preparer's na		signature / / // 1	Date , Check if PT	IN
			10 1/4/1 1/-	self- employed	
Paid	DEBORAH A.	HOPKINS	HUMINDALA		00167843
Preparer	Firm's name ► KAH		ZA & CO. I.TD	Firm's EIN ► 05-	
Use Only	THIS SHOULD > ACCOUNT	THE DESCRIPTION		1111132111 2 0 3	
	Firm's address > 80	00 SOUTH STREET	SUITE 300		
		ALTHAM, MA 0245		Phone no. 781-	-547-8800
		minni, fin 0233.	<u> </u>	Tribusio. 701	Form 990-PF (2013)
					1 OHH 2 2 2 2 1 1 1 2 2 1 3

ba can't take A cahirdi nama and re	12262 INL LAY OIL MASSIMENT MEDING			10.5.	,	
	d describe the kind(s) of property solution warehouse, or common stock, 20			P - Purchase	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a FIDELITY INVES	·		DEOL	D - Donation		
b FIDELITY INVES		AVAILABLE UPON				
c FIDELITY INVES		AVAILABLE UPON				
d FIDELITY INVES		AVAILABLE UPON				
e FIDELITY INVES		AVAILABLE UPON	REQU	<u> </u>		
f PARTNERSHIP FI		AP GAIN				
q PARTNERSHIP FL		AP GAIN				
h BASIS ADJUSTME						
PARTNERSHIP FI		231 GAIN				
CAPITAL GAINS	DIVIDENDS			<u> </u>		
k						
1						
m						
Π						
0						
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		(h) (e) p	Gain or (loss) dus (f) minus (g)	
2						4,764.
<u>a</u>						62,702.
<u>b</u>					1	553,455.
C			_		7,	3,149.
<u>d</u>	<u> </u>					2,394.
8	 					101,610.
<u>f</u>	ļ			· · · · · · · · · · · · · · · · · · ·		727,859.
9	<u> </u>					802,008.
h				·		1,148.
174 240						$\frac{1,148.}{474,248.}$
1 474,248.						4/4,240.
<u>k</u>						
<u> </u>						
m						
n				·		
0		10.001.00				
Complete only for assets showl	ng gain in column (h) and owned by	T		(I) Los	sses (from col. (h)) of col. (h) gain over	cool (Iv)
(I) F M V as of 12/31/69	(i) Adjusted basis	(k) Excess of col (i)		but n	ot less than "-0-")	coi. (k),
(1) 111 43 61 12/61/65	as of 12/31/69	over col (j), if any				
<u>a</u>						4,764.
b						62,702.
<u>c</u>					<u>l</u> ,	553,455.
d						3,149.
θ	<u> </u>				·····	2,394.
1				·		101,610.
9	1					727,859.
h					······································	802,008.
i						1,148.
i						474,248.
k						
1						
m						
n						
0						
2 Capital gain net income or (net c	apital loss) ···· (if gain, also enter -0	r in Part I, line 7	2	ļ	4,	733,337.
	• •	`		1		<u></u>
3 Net short-term capital gain or (lo if gain, also enter in Part 1, line 8	ss) as defined in sections 1222(5) an	iu (o)				
If (loss), enter "-0-" in Part I, line		J	3	1	N/A	

Pârt XV Supplementary Information				1
3 Grants and Contributions Paid During the Y	ear (Continuation) If reciplent is an individual,	T	1	
Recipient	show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient		
BRIDGE FUND OF NY, INC.	NONE	PUBLIC CHARITY	GENERAL SUPPORT	
271 MADISON AVE # 907	}		}	
NEW YORK, NY 10016				10,000.
COLLEGE FORWARD	NONE	PUBLIC CHARITY	IT PROJECT	
312 MURRAY STREET				
MANOR, TX 78653		<u> </u>		325,000.
CONCERNED CITIZENS OF MONTAUK	NONE	PUBLIC CHARITY	GENERAL SUPPORT &	
P.O. BOX 915			MATCHING GRANTS	
MONTAUK, NY 11954				110,000.
COTTONWOOD GULCH FOUNDATION	NONE	PUBLIC CHARITY	GENERAL SUPPORT &	
P.O. BOX 25106			SCHOLARSHIPS	
ALBUQUERQUE, NM 87125				28,000.
E3 ALLIANCE	NONE	PUBLIC CHARITY	GENERAL SUPPORT	
5930 MIDDLE FISKVILLE ROAD, SUITE 507	ĺ			
AUSTIN, TX 78752		 		10,000.
FAMILIES OF SPINAL MUSCULAR ATROPHY	NONE	PUBLIC CHARITY	OPERATING SUPPORT	
925 BUSSE ROAD			1	
ELK GROVE VILLAGE, IL 60007				10,000.
GLOUCESTER EDUCATION FOUNDATION	NONE	PUBLIC CHARITY	GENERAL SUPPORT,	
122 MAIN STREET GLOUCESTER, MA 01930			PROGRAM AND GRANT	}
GDOOCESTER, MR 01930			PROPOSAL VOLUNTEER	
			COORDINATOR & GRANT	60,000.
OLOUGROUND SPUGLETON DOWNDAMYON DAY	YOUR	DIEDITO CUADTEV	GENERAL SUPPORT	
GLOUCESTER EDUCATION FOUNDATION: BAY STATE READING	NONE	FUBBIC CHARIII	SENERAL SUFFORT	
122 MAIN STREET				
GLOUCESTER, MA 01930				30,000.
		1		
KARME CHOLING	NONE	PUBLIC CHARITY	general support	
369 PATENEAUDE LANE				
BARNET, VT 05821		<u> </u>		10,000.
RIMBALL UNION ACADEMY	NONE	PUBLIC CHARITY	CAPITAL CAMPAIGN &	
7 CAMPUS CENTER DRIVE			GENERAL SUPPORT	
MERIDEN, NH 03770	<u> </u>			100,000
Total from continuation sheets		<u> </u>	<u> </u>	1,594,204.

Part XV Supplementary Information			· · · · · · · · · · · · · · · · · · ·	
3 Grants and Contributions Paid During the		T		
Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	Amount
Nume and address (nome of pushiess)	or substantial contributor	recipient		
LOCAL POOD HUB	NONE	PUBLIC CHARITY	OPERATING SUPPORT	
P.O. BOX 4647 CHARLOTTESVILLE VA 22905		ļ		116,000.
CHARLOTTESVILLE, VA 22905				
MAIN STREET ARTS	NONE	PUBLIC CHARITY	CAPITAL CAMPAIGN	
35 MAIN STREET	NONE			
SAXTONS RIVER, VT 05154				30,000.
NEWTON - WELLESLEY HOSPITAL CHARITY	NONE	PUBLIC CHARITY	GENERAL SUPPORT	
FOUNDATION				
2014 WASHINGTON STREET				
NEWTON, MA 02462		 		15,000.
NORTHEASTERN UNIVERSITY: SOCIAL	NONE	PUBLIC CHARITY	CAPSTONE GRANT PROGRAM	
ENTERPRISE INSTITUTE				
360 HUNTINGTON AVENUE				
BOSTON, MA 02115				37,500.
NORTHFIELD MOUNT HERMON SCHOOL	NONE	PUBLIC CHARITY	GENERAL SUPPORT &	
ONE LAMPLIGHTER WAY NORTHFIELD MA 01354			PACULTY PROFESSIONAL DEVELOPMENT	50,000,
NORTH FIELD, MA 01334				
OPEN DOOR PREGGIOOT	NONE	DIIDI.IC CUADITY	GENERAL SUPPORT	
OPEN DOOR PRESCHOOL 1717 WEST 10TH STREET	NONE	FOBLIC CHARIII	BENERAL SOFFORT	
AUSTIN, TX 78703				10,000
PRISON UNIVERSITY PROJECT	NONE	PUBLIC CHARITY	OPERATING SUPPORT	
P.O. BOX 492				
SAN QUENTIN, CA 94964				130,000
RED GATE FARM EDUCATION CENTER	NONE.	PUBLIC CHARITY	GENERAL SUPPORT	
PO BOX 300 BUCKLAND, MA 01338				5,000
DOCKMIND, INFOUNDED	-			
ROCKPORT CHAMBER MUSIC FESTIVAL	NONE	PURT.TC CHARTTY	GENERAL SUPPORT,	
35 MAIN STREET	1000		EQUIPMENT REPAIR &	
ROCKPORT, MA 01966		<u> </u>	LOAN INTEREST	27,704
SOLI CHAMBER ENSEMBLE	NONE	PUBLIC CHARITY	GENERAL SUPPORT	
P.O. BOX 6062				5 000
SAN ANTONIO, TX 78209 Total from continuation sheets		<u> </u>	J	5,000

3 Grants and Contributions Paid During the Y			 	
Recipient	If recipient is an Individual, show any relationship to	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	any toundation manager or substantial contributor	recipient		
ST ANSELM COLLEGE	NONE	PUBLIC CHARITY	GENERAL SUPPORT &	
100 SAINT ANSELM DRIVE			SCHOLARSHIPS	
MANCHESTER, NH 03102	<u> </u>			25,0
THE OPEN DOOR (CAPE ANN FOOD PANTRY &	NONE	PUBLIC CHARITY	GENERAL SUPPORT &	
PRESCHOOL)			PEEDING SUCCESS	
28 EMERSON AVENUE			PROGRAM	
SLOUCESTER, MA 01930				10,0
UNITED WAY GREATER AUSTIN	none	PUBLIC CHARITY	GENERAL SUPPORT &	
2000 E MARTIN LUTHER KING JR BLVD			FINANCIAL EDUCATION	
AUSTIN TX 78702			COORDINATOR	10,0
			h	
UT HEALTH SCIENCE CENTER SAN ANTONIO	NONE	PUBLIC CHARITY	DR JACKSON'S ALS	
7703 FLOYD CURL DRIVE			Center.	425,0
SAN ANTONIO, TX 78229-3900				+25,0
WHEELCHAIR SPORTS AND RECREATION	NONE	PUBLIC CHARTTY	GENERAL SUPPORT	
906 HIGHWAY 98 E.	NONE			
DESTIN FL 32541				5,0
		1		
	-			
	·			
		1	1	

3 Grants and Contributions Approved for Futi	ure Payment (Continuation)		<u> </u>	<u> </u>
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	status of recipient	Contribution	, dik
I HEALTH SCIENCE CENTER SAN ANTONIO	NONE	PUBLIC CHARITY	DR JACKSON'S ALS	
703 FLOYD CURL DRIVE			CENTER	
AN ANTONIO, TX 78229-3900				600,0
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	•	J.M.R. BARI C/O BALLEN			.С	13-6268289
Part XV	Supplementary In	formation				
3a Grants a	nd Contributions Paid	During the Year Conti	nuation of Purpose	of Grant or	Contribution	
NAME OF	RECIPIENT -	GLOUCESTER	EDUCATION	FOUNDA	TION	
GENERAL	SUPPORT, DA	TING VIOLENC	CE PROGRAM	AND GR	ANT PROPOSAL	VOLUNTEER
COORDIN	ATOR & GRANT	PROPOSAL WI	RITER			
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			_ ',,'			

FORM 990-PF INTERI	EST ON SAVING	S AND T	EMPORARY	CASH 1	NVESTMENTS	STATEMENT	1
SOURCE		RE	(A) VENUE BOOKS		(B) INVESTMENT INCOME	(C) ADJUSTED NET INCOM	E
PARTNERSHIP FLOW THE INTEREST VARIOUS ACCOUNTS	HROUGH		3,141. 276,882.		3,141. 276,882.		
TOTAL TO PART I, L	INE 3		280,023.		280,023.		
FORM 990-PF	DIVIDENDS	AND INT	EREST FR	OM SECU	JRITIES	STATEMENT	2
SOURCE	GROSS AMOUNT	CAPIT GAIN DIVIDE	S R	(A) EVENUE R BOOKS	(B) NET INVEST MENT INCOM		
PARTNERSHIP FLOW THROUGH DIVIDENDS VARIOUS ACCOUNTS	266,608. 1,142,065.	474,		266,608 667,817			
TO PART I, LINE 4	1,408,673.	474,	248.	934,425	934,42	5.	
FORM 990-PF		OTHER	INCOME			STATEMENT	3
DESCRIPTION			(A) REVEN PER BO	IUE	(B) NET INVEST- MENT INCOME	(C) ADJUSTEI NET INCOI	
MISCELLANEOUS			<	1,600.>	<1,600	.>	
TOTAL TO FORM 990-1	PF, PART I, L	INE 11	<	1,600.>	<1,600	.>	

DESCRIPTION	FORM 990-PF	LEGAL	FEES	S'	PATEMENT 4
### TO FM 990-PF, PG 1, LN 16A	DESCRIPTION	EXPENSES	NET INVEST-	ADJUSTED	CHARITABLE
FORM 990-PF ACCOUNTING FEES STATEMENT 5 (A) (B) (C) (D) (CHARITABLE PER BOOKS MENT INCOME NET INCOME PURPOSES ACCOUNTING FEES 46,136. 9,227. 36,909. TO FORM 990-PF, PG 1, LN 16B 46,136. 9,227. 36,909. FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 6 (A) (B) (C) (C) (D) (CHARITABLE PURPOSES STATEMENT 60 (C) (D) (C) (D) (C) (D) (C) (D) (C) (D) (C) (D) (C) (D) (D) (D) (D) (D) (D) (D) (D) (D) (D	LEGAL FEES	10,253.	2,051.		8,202.
CA CE CE CE CE CE CE CE	TO FM 990-PF, PG 1, LN 16A	10,253.	2,051.		8,202.
EXPENSES PER BOOKS NET INVEST- ADJUSTED CHARITABLE	FORM 990-PF	ACCOUNTI	NG FEES	S'	TATEMENT 5
TO FORM 990-PF, PG 1, LN 16B 46,136. 9,227. 36,909. FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 6 (A) (B) (C) (D) (D) (D) (D) (D) (D) (D) (D) (D) (D	DESCRIPTION	EXPENSES	NET INVEST-	ADJUSTED	CHARITABLE
FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 6 (A) (B) (C) (D) EXPENSES NET INVEST- ADJUSTED CHARITABLE PER BOOKS MENT INCOME NET INCOME PURPOSES FOUNDATION ADVISORS 103,206. 20,641. 82,565. TO FORM 990-PF, PG 1, LN 16C 103,206. 20,641. 82,565. FORM 990-PF TAXES STATEMENT 7 (A) (B) (C) (D) EXPENSES NET INVEST- ADJUSTED CHARITABLE PER BOOKS MENT INCOME NET INCOME PURPOSES FEDERAL EXCISE TAX 127,211. 0. 0. 0. 0. 0. 0. 0. 0. 0. 0. 0. 0. 0.	ACCOUNTING FEES	46,136.	9,227.		36,909.
Ca	TO FORM 990-PF, PG 1, LN 16B	46,136.	9,227.		36,909.
EXPENSES NET INVEST- ADJUSTED CHARITABLE PER BOOKS MENT INCOME NET INCOME PURPOSES FOUNDATION ADVISORS 103,206. 20,641. 82,565. TO FORM 990-PF, PG 1, LN 16C 103,206. 20,641. 82,565. FORM 990-PF TAXES STATEMENT 7 (A) (B) (C) (D) (D) (CHARITABLE PER BOOKS MENT INCOME NET INCOME PURPOSES FEDERAL EXCISE TAX 127,211. 0. 0. 0. 0. 0. 0. 0. 0. 0. 0. 0. 0. 0.	FORM 990-PF C	THER PROFES	SIONAL FEES	S'	PATEMENT 6
TO FORM 990-PF, PG 1, LN 16C 103,206. 20,641. 82,565. FORM 990-PF TAXES STATEMENT 7 (A) (B) (C) (D) (D) (EXPENSES NET INVEST- ADJUSTED CHARITABLE PER BOOKS MENT INCOME NET INCOME PURPOSES FEDERAL EXCISE TAX 127,211. 0. 0. 0. 0. FOREIGN TAXES 22,033. 22,033. 22,033. 0. PAYROLL TAXES 9,090. 4,545. 4,545.	DESCRIPTION	EXPENSES	NET INVEST-	ADJUSTED	CHARITABLE
FORM 990-PF TAXES STATEMENT (A) EXPENSES NET INVEST- ADJUSTED CHARITABLE PER BOOKS MENT INCOME NET INCOME PURPOSES FEDERAL EXCISE TAX 127,211. 0. FOREIGN TAXES 22,033. 22,033. 9,090. 4,545. 24,545.	FOUNDATION ADVISORS	103,206.	20,641.		82,565.
(A) (B) (C) (D) EXPENSES NET INVEST- ADJUSTED CHARITABLE PER BOOKS MENT INCOME NET INCOME PURPOSES FEDERAL EXCISE TAX FOREIGN TAXES 22,033. 22,033. 22,033. 0. PAYROLL TAXES 9,090. 4,545.	TO FORM 990-PF, PG 1, LN 16C	103,206.	20,641.		82,565.
DESCRIPTION EXPENSES NET INVEST- ADJUSTED CHARITABLE PER BOOKS MENT INCOME NET INCOME PURPOSES FEDERAL EXCISE TAX 127,211. FOREIGN TAXES 22,033. 22,033. 9,090. 4,545. 24,545.	FORM 990-PF	TAX	ES	S	PATEMENT 7
FOREIGN TAXES 22,033. 22,033. 0. PAYROLL TAXES 9,090. 4,545. 4,545.	DESCRIPTION	EXPENSES	NET INVEST-	ADJUSTED	CHARITABLE
TO FORM 990-PF, PG 1, LN 18 158,334. 26,578. 4,545.	FOREIGN TAXES	22,033.	22,033.		0. 0. 4,545.
	TO FORM 990-PF, PG 1, LN 18	158,334.	26,578.		4,545.

FORM 990-PF	OTHER E	XPENSES	S'	STATEMENT 8		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES		
TRAVEL & ENTERTAINMENT ADMINISTRATIVE EXPENSES BUSINESS EXPENSES PRECIOUS METALS INVESTMENT EXPENSES	54,757. 5,094. 6,593. 25,767. 205,861.			27,379. 5,094. 6,593. 0.		
TO FORM 990-PF, PG 1, LN 23	298,072.	259,007.		39,066.		
	FOOTN	OTES	S	TATEMENT 9		
GRANTS PAID OUT DURING THE YELESS PY GRANTS PAYABLE ADD CY GRANTS PAYABLE	EAR			2,409,204. 242,704. 735,000.		
GRANT EXPENSE PER BOOKS			_	2,901,500.		

FORM 990-PF OTHER DECREASES IN	N NET ASSETS	OR FUND BALANCES	STATEMENT 10
DESCRIPTION			AMOUNT
BOOK-TAX DIFFERENCE IN ACTIVITY INTERPOLATION ON INVEST		OUGHS	421,297. 2,567,474.
TOTAL TO FORM 990-PF, PART III, I	LINE 5		2,988,771.
FORM 990-PF U.S. AND STATE	E/CITY GOVERN	MENT OBLIGATIONS	STATEMENT 11
DESCRIPTION		HER V'T BOOK VALUE	FAIR MARKET VALUE
US TREASURY BONDS	X	8,995,162.	8,995,162.
TOTAL U.S. GOVERNMENT OBLIGATIONS	S	8,995,162.	8,995,162.
TOTAL STATE AND MUNICIPAL GOVERNM	MENT OBLIGATI	ONS	
TOTAL TO FORM 990-PF, PART II, L	INE 10A	8,995,162.	8,995,162.
FORM 990-PF (CORPORATE STO	CK	STATEMENT 12
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
EQUITIES		11,630,188.	11,630,188.
TOTAL TO FORM 990-PF, PART II, L	INE 10B	11,630,188.	11,630,188.
	THER INVESTME	NTS	STATEMENT 13
FORM 990-PF O			······································
DESCRIPTION	VALUATI METHOD		FAIR MARKET VALUE
	VALUATI		

FORM 990-PF	OTHER ASSETS		STATEMENT 14
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
INVESTMENT IN MUTUAL FUNDS INTEREST RECEIVABLES	23,545,128.	26,140,073. 129,731.	26,140,073. 129,731.
TO FORM 990-PF, PART II, LINE 15	23,684,017.	26,269,804.	26,269,804.
FORM 990-PF OT	HER LIABILITIES		STATEMENT 15
DESCRIPTION		BOY AMOUNT	EOY AMOUNT
DEFERRED TAX LIABILITY ACCRUED TAXES		353,881.	285,462. 79,402.
TOTAL TO FORM 990-PF, PART II, LI	353,881.	. 364,864	

FORM 990-PF PART VIII - LIST TRUSTEES AND	OF OFFICERS, D FOUNDATION MANA	STATEMENT 1		
NAME AND ADDRESS	TITLE AND AVRG HRS/WK			EXPENSE
JAMES R. BARKER 10 NAOMI DRIVE GLOUCESTER, MA 01930	VP, CIO & DIRE 20.00	125,000.	0.	0.
RICHARD KAHN 224 WEST LAKE DRIVE MONTAUK, NY 11954	DIRECTOR 0.50	0.	0.	0.
W.B. BARKER 23910 NORTH LINE CAMP SAN ANTONIO, TX 78255	VP & DIRECTOR 0.50		0.	0.
MARGARET BARKER CLARK P.O. BOX 743 SAXTONS RIVER, VT 05154	PRESIDENT & DI 0.50	RECTOR 0.	0.	0.
JOHN W. HOLMAN, JR. HINTZ, HOLMAN & ROBILLARD, INC, 4 CONNELL DRIVE, SUITE 5100 BERKELEY HTS, NJ 07922	DIRECTOR 0.50	0.	0.	0.
ROBERT P. CONNOR 1185 AVENUE OF THE AMERICAS NEW YORK, NY 10036	TR/ ASST SECR 2.00	& DIRECTOR 0.	0.	0.
MARGARET S. BARKER MOORE 1933 ANTONE STREET AUSTIN, TX 78723	DIRECTOR 0.50	0.	0.	0.
WILLIAM S. BARKER 6 GRIST MILL ROAD ACTON, MA 01720	DIRECTOR 0.50	0.	0.	0.
TROY Y. MURRAY 47 WINGATE ROAD WELLESLEY, MA 02481	DIRECTOR 0.50	0.	0.	0.
KATHRYN BARKER 11411 ALBANO ROAD BARBOURSVILLE, VA 22923	DIRECTOR 0.50	0.	0.	0.

J.M.R. BARKER FOUNDATION C/O BAI	LLENTINE		13-63	268289
GREGORY D. BARKER 2140 OREGON STREET BERKELEY, CA 94705	DIRECTOR 0.50	0.	0.	0.
GRETCHEN LUCAS 100 FIRST ST, 14TH FL SAN FRANCISCO, CA 94105	SECRETARY 10.00	(8/1/13 - 12/31/13) 0.	0.	0.
SUSANNE SELARNO 255 STATE STREET BOSTON, MA 02109	SECRETARY 2.00	(1/1/13 - 7/31/13) 0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6	, PART VIII	125,000.	0.	0.

FORM 990-PF

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

STATEMENT 17

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

JMR BARKER FOUNDATION C/O BALLENTINE PARTNERS, LLC 230 3RD AVENUE, 6TH FL WALTHAM, MA 02451

TELEPHONE NUMBER

781-314-1300

FORM AND CONTENT OF APPLICATIONS

BEFORE A FORMAL PROPOSAL SUBMISSION IS MADE, AN ORGANIZATION REQUESTING A GRANT FROM THE FOUNDATION SHOULD SUBMIT A PRELIMINARY LETTER OF INQUIRY. THIS LETTER SHOULD BRIEFLY DESCRIBE THE PROGRAMS OF THE SPONSORING ORGANIZATION, INDICATE THE AMOUNT REQUESTED AND WHAT WILL BE ACCOMPLISHED AS A RESULT OF THE GRANT. THIS INFORMATION SHOULD BE DETAILED ENOUGH TO ENABLE THE FOUNDATION TO DETERMINE WHETHER THE GRANT REQUEST SHOULD BE CONSIDERED FURTHER. IF THE PROPOSAL IS WITHIN THE FOUNDATION'S CURRENT INTERESTS, ADDITIONAL INFORMATION INCLUDING A BUDGET FOR THE PROJECT, AUDITED FINANCIAL STATEMENTS AND AN IRS DETERMINATION LETTER WILL BE REQUESTED. THE MEETING OF THE BOARD OF DIRECTORS FOR CONSIDERATION OF PROPOSALS IS NORMALLY HELD IN DECEMBER.

ANY SUBMISSION DEADLINES

INITIAL LETTERS OF INQUIRY MUST BE SUBMITTED BY NOVEMBER 1ST IN ORDER TO BE CONSIDERED.

RESTRICTIONS AND LIMITATIONS ON AWARDS

GENERALLY, GRANTS MADE BY THE FOUNDATION RANGE IN SIZE FROM \$1,000 TO \$1,000,000. ALTHOUGH MANY OF OUR GRANTS ARE MADE IN THE GREATER NEW YORK AREA, INQUIRIES FROM ALL PARTS OF THE UNITED STATES ARE WELCOME.

Form 8868 (Rev. 1-2014) Page 2										
• If you are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II and check this box										
Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.										
If you are filing for an Automatic 3-Month Extension, complete only Part I (on page 1).										
Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).										
Enter filer's identifying number, see instructions										
Type or Name of exempt organization or other filer, see instruc	r identification number (EIN) or									
print J.M.R. BARKER FOUNDATION										
Flie by the C/O BALLENTINE PARTNERS, LLC	:		13-6268289							
due date for Number street and room or suite no. If a P.O. box, se		lons.	Social security number (SSN)							
return, See 230 3RD AVENUE, 6TH FLOOR										
Instructions City, town or post office, state, and ZIP code. For a foreign address, see instructions.										
WALTHAM, MA 02451		•								
Enter the Return code for the return that this application is for (file	a separat	te application for each return)	_		0 4					
,	•									
Application	Return	Application	Return							
ls For	Code	ls For		Code						
Form 990 or Form 990-EZ	01	T AND BETTER TOTAL			17778					
Form 990·BL	02	Form 1041-A			08					
Form 4720 (individual)	03	Form 4720 (other than individual)			09					
Form 990-PF	04	Form 6227			10					
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069								
Form 990-T (trust other than above)	06	Form 8870			12					
STOP! Do not complete Part II If you were not already granted	an auton	natio 3-month extension on a prev	iously file	d Form 8868.						
C/O BALLENTINE	PARTI	NERS, LLC	00	4 = 3						
• The books are in the care of ► 230 3RD AVENUE,	6TH		MA 024	451						
Telephone No. ► <u>(781)</u> 314-1300		Fax No. >			K 1					
 If the organization does not have an office or piace of business 				>	الل					
• If this is for a Group Return, enter the organization's four digit (
box ►			all membe	ers the extension is	s lor.					
1 1 odgest at additional of the truth order to the artist		BER 15, 2014.								
6 For calendar year 2013, or other tax year beginning		, and endin		-4						
6 If the tax year entered in line 5 is for less than 12 months, cl	neck reas	on: LInitial return L	Final re	eturn						
Change in accounting period										
7 State in detail why you need the extension	מ זאר	E NECESSARY IN ORD	ER TO	PREPARE	AN					
ADDITIONAL TIME AND INFORMATION ARE NECESSARY IN ORDER TO PREPARE AN ACCURATE RETURN.										
ACCORATE RETORN:										
9a (f this explication in for Forms 990-B) 990-BE 990-T 4720	or 6060	enter the tentative tax less any	<u> </u>		······································					
8a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.				\$ 16	5,979.					
b If this application is for Forms 990-PF, 990-T, 4720, or 6069	8a									
tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.										
Balance due. Subtract line 8b from line 8a. Include your payment with this form, if required, by using										
EFTPS (Electronic Federal Tax Payment System). See Instructions.										
EFTPS (Electronic Federal Tax Payment System). See Instructions. Bc \$ 0 . Signature and Verification must be completed for Part II only.										
Under penalties of pernuy. I declare that share examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief.										
Under penalties of pernuy, I declare that I have examined this form, including accompanying schedules and statements, and to the bast of my knowledge and belief, it is true, correct and property anythat I am hydronized to prepare this form.										
Signature \ D \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \										
				Form 8868 (F	lev. 1-2014)					

Form **8868**

(Rev January 2014)

Department of the Treasury

Application for Extension of Time To File an Exempt Organization Return

► File a separate application for each return.

OMB No 1545-1709

due date for Number, street, and room or suite no. If a P.O. box, see instructions.	Internal Reve	snue Service	► Information about Form 886	8 and its i	nstructions is at www.irs.gov/forn	n8868.			
** If you are filling 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 growously filed Form 8885. Electronic filling (6-fills). You can electronically file Form 8885 if you need a 3-month automatic advancing to file (6-months for a corporation experience of time to file any of the forms isoted 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 pager formst feel instructions). For more details on the electronic string of this form, institute with any admitted and citizen and file of Deminists 2 Monarials. Part I attempted 3-Month Extension of Time. Only submit original (no copies needod). Acorporation regulated to file Form 990-T and requising an automatic 6-month extension - check this box and complete Part I only All others comporations (including 1120-C filess), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time for file income tex returns. Enter fillor's identifying an automatic 6-month extension - check this box and complete Part I only All others comporations (including 1120-C filess), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time for file income tex returns. Enter fillor's identifying an automatic 6-month extension - check this box and complete Part I only A N. R. BARKER FOUNDATION J. M. R. BARKER FOUNDATION Application File the Return code for the return that this application is for (file a separate application for each return) Application File for Code Is For Code Is For Code For a foreign address, see instructions. WALTHAM, MA 0.2451 Form 990-Form 590-Form 590-E2 O. BALLENTINE PARTNERS, L. L.C The books are in the care of P 2.30 a 3RD AVENU	• If you a	If you are filing for an Automatic 3-Month Extension, complete only Part I and check this box							
Do not complete Part It unless you have a straidy been granted an automatic 3-month extension on a proviously field 6-fmm 886. It is electronically file (File). You can electronically file form 886 in or most 3-month automatic axtension of time to file form 886 in or part in or Part It with the exception of Form 870, information of time to file form 886 in or equation of time to file any of the forms is test in Part I or Part It with the exception of Form 870, information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRSI in paper format (see Instructions). For more details on the electronic filing of this form, Visit wave in a part of the most in the state of the IRSI in paper format (see Instructions). For more details on the electronic filing of this form, Visit wave in a part of the IRSI in paper format (see Instructions). For more details on the electronic filing of this form, Visit wave in a part of the IRSI in paper format (see Instructions). For more details on the electronic filing of this form, Visit wave in a part of the IRSI in paper format (see Instructions). For more details on the electronic filing of this form, Visit wave in a part of the IRSI in paper format (see Instructions). For more details on the electronic filing of this form, Visit wave in a part of the IRSI in paper format (see Instructions). For more details on the electronic filing of this form, Visit wave in a paper format (see Instructions). For more filing of this form, Visit wave in a paper format (see Instructions). For more filing of this form, Visit wave in a paper format (see Instructions). For more filing of this form filing of the IRSI in a paper format (see Instructions). For more filing of the IRSI in a paper formation of the IRSI in a paper formation for filing					· · · · · · · · · · · · · · · · · · ·		****************		
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required to file Form 980 T), or an additional (not automatic) 3-month extension of time. You can electronically life form 6880 to request an extension of time to file any of the forms isted in Part I or Part I with the exception of Form 8870, information Return for Transfers Associated With Certain Personal Benefit Centracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, useful twew descriptions and click on - file for Cetteries & Nonpendits. Part I only Accipioration required to file Form 990 T and requesting an automatic G-month extension - check this box and complete Part I only All other corporations (including 1120-Ci filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time for the inchema tax returns. Part I only All other corporations (including 1120-Ci filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time for the inchema tax returns. Enter (filer's Identifying number (EIN) or 10 inchema for the inchema for			·					a corporation	
of time to tile any of the forms lated in Part 1 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 filling of this form, visit invervirs, powinds and cick, on a fill for Circuities & Reagandia. Part 1									
Personal Benefit Contracts, which must be sent to the IRS in pager format (see instructions). For more details on the electronic filing of this form, wiskil www.irs.cov/filing and cisks on	•	- //			•				
Visit New in Special Citics on e-like for Cherities & Nonprofits.									
Part Automatic 3-Month Extension of Time. Only submit original (no copies needod). A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete		•	* *		ose monachement, i or more certaine e			,	
Acorporation 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 for request an extension of time to file income tax returns. Enter filler's (identifying number file) or print for file income tax returns. J.M. R. BARKER FOUNDATION C/O BALLENTINE PARTNERS, LLC 13-6268289 Number, street, and room or suits no. if a P.O. box, see instructions. 230 3RD AVENUE, 6TH FILOOR Number, street, and room or suits no. if a P.O. box, see instructions. 230 3RD AVENUE, 6TH FILOOR WALTHAM, MA 02451 Enter the Return code for the return that this application is for (file a separate application for each return) Application Form 990-Form 990-EZ 10 1 Form 990-Tourn 990-EZ 11 Form 990-Tourn 990-EZ 12 Form 990-Tourn 990-EZ 13 Form 990-Tourn 990-EZ 14 Form 990-Tourn 990-EZ 15 Form 990-Tourn 990-EZ 16 Form 990-Tourn 990-EZ 17 Form 990-Tourn 990-EZ 18 Form 990-Tourn 990-EZ 19 Form 990-Tourn 990-EZ 10 Form 990-Tourn 990-EZ 10 Form 990-Tourn 990-EZ 11 Form 990-Tourn 990-EZ 12 Form 990-Tourn 990-EZ 13 Form 990-Tourn 990-EZ 14 Form 990-Form 990-For					ubmit original (no copies ne	edod).	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		
Application Peturn Petur									
All other corporations (including 1120-0 (fless), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to find incrome tex returns. Type or print J. M. R. BARKER FOUNDATION								▶ □	
to file income tex returns. Name of exempt organization or other filer, see instructions. J. M. R. BARKER FOUNDATION C/O BALLENTINE PARTINERS, LLC 13-6268289 Social security number (EIN) or Jane does not have filer as each return. Social security number (SSN) 230 3RD AVENUB, 6TH FLOOR City, town or post office, state, and 2IP code. For a foreign address, see instructions. WALTHAM, MA 02451 Enter the Return code for the return that this application is for (file a separate application for each return) Application Application Form 990 or Form 990-EZ Code 15 For Code 15 Form 990-Form 99		,	ting 1120-C filers), partnerships, REMi	Cs. and tr	usts must use Form 7004 to reques	t an extens	sion of time		
Type or print Name of axempt organization or other fler, see instructions. J.M.R. BARKER FOUNDATION 13-6268289			, , , , , , , , , , , , , , , , , , ,	,				na number	
J. M. R. BARKER FOUNDATION C/O BALLENTINE PARTNERS, LLC 13-6268289 **Social security number (SSN)** 230 3RD AVENUE, 6TH FLOOR City, town or post office, state, and ZIP code. For a foreign address, see instructions. WALTHAM, MA 02451 **Enter the Return code for the return that this application is for (file a separate application for each return) **Application** Be for Code Is For Code Code Is For 4720 (Individual) Code Is Form 990-T (corporation) Code Is Form 990-T (corporation) Code Is Form 990-T (sec. 401(a) or 408(a) trust) Code Code Is Form 4720 (Individual) Code Code Code Code Code Code Code Code	Type or	Name of exemp	t organization or other filer, see instruc	ctions.			······································		
C/O BALLENTINE PARTNERS, LLC Number, street, and room or sulfe no. If a P.O. box, see instructions. Social security number (SSN) Number, street, and room or sulfe no. If a P.O. box, see instructions. City, town or post office, state, and ZIP code. For a foreign address, see instructions. WALTHAM, MA 02451 Enter the Return code for the return that this application is for (file a separate application for each return) Application Beturn Code Application Return Code Application Form 990 Form 990 EZ O1 Form 990 Form 990 Form 990 EZ O1 Form 990 Form 990 Form 990 FZ O1 Form 990 Form 990 FT Code Form 9	• •								
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City, town or post office, state, and ZIP code. For a foreign address, see instructions.	File by the				ions.	Social sec			
City, town or post office, state, and ZIP code. For a foreign address, see instructions. WALTHAM, MA 02451 Enter the Return code for the return that this application is for (file a separate application for each return) Application B Form 990 or Form 990 o	filing your						,		
Enter the Return code for the return that this application is for (file a separate application for each return)				reian add	ress, see instructions.	******			
Application Return Application Return Application Return Code Is For Code Series Series Code Series Series Code Series Series Code Series Code Series Series Code Code Series Code C		I							
Application Form 990 or Form 990-EZ	<u> </u>	1 //				·			
Application s For Code s For s Forn 990-T (corporation) O7 Form 990-T (corporation) O7 Form 990-T (corporation) O8 Form 4720 (other than individual) O8 Form 4720 (other than individual) O9 Form 990-T (coc. 401(a) or 408(a) trust) O5 Form 6089 11 Form 990-T (trust other than above) O6 Form 8870 12 Telephone No. ► (70 BALLENTINE PARTNERS, LLC * The books are in the care of ► 230 3RD AVENUE, 6TH FLOOR ~ WALTHAM, MA 02451 Telephone No. ► (781) 314-1300 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 the organization does not have an office or place of business in the United States, check this box If the start that the part of the group, check this box ► and attach a list with the names and ElNs of all members the extension is for the whole group, check this box ► and attach a list with the names and ElNs of all members the extension is for the organization's return for. ► X calendar year 2013 or ► If this application is return for. ► X calendar year 2013 or ► Initial return Final return Change in accounting period tax year entered in line 1 is for less than 12 months, check reason: Initial return Final return Change in accounting period tax year entered in line 1 is for Forms 990-PF, 990-F, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions 3e 165, 979. b If this application is for Forms 990-PF, 990-F, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions 3e 165, 979. c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required. 3c 140,000.	Enter the	Return code for th	e return that this application is for (file	a separat	te application for each return)			04	
Section Sect				•					
Section Sect	Applicati	on		Return	Application			Return	
Form 990 or Form 990-EZ								Code	
Form 990-BL Form 990-FF Form 990-FF Form 990-FF Form 990-FF Form 990-F (sec. 401(a) or 408(a) trust) Form 990-F (trust other than above) C/O BALLENTINE PARTNERS, LLC The books are in the care of ▶ 230 3RD AVENUE, 6TH FLOOR → WALTHAM, MA 02451 Telephone No. ▶ (781) 314-1300 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 a Group Return, enter the organization's four digit Group Exemption Number (GEN) If this for part of the group, check this box ▶ and attach a list with the names and ElNs of all members the extension is for the organization's return for. AUGUST 15, 2014 It file for part of the exempt organization return for the organization named above The extension is for the organization's return for. X calendar year 2013 or The part of the file 1 is for less than 12 months, check reason: Initial return Change in accounting period If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions Balance due, Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Eloctronic Federal Tax Payment System), See instructions. 3c \$ 140,000.		or Form 990-EZ			Form 990-T (corporation)	*!···		07	
Form 4720 (Individual) Form 990-PF O4 Form 5227 10 Form 990-T (sec, 401(a) or 408(a) trust) O5 Form 8069 11 Form 990-T (trust other than above) C/O BALLENTINE PARTNERS, LLC The books are in the care of 230 3RD AVENUE, 6TH FLOOR - WALTHAM, MA 02451 Telephone No. (781) 314-1300 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 part of the group, check this box If this is for part of the group, check this box If this is for part of the group, check this box AUGUST 15, 2014 Is to file the exempt organization return for the organization's return for. X calendar year 2013 or The tax year entered in line 1 is for less than 12 months, check reason: The tax year entered in line 1 is for less than 12 months, check reason: The tax year paginning 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 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 The salance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Eloctronic Federal Tax Payment System). See instructions. 3c \$ 140,000.							**************************************	08	
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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	by using EFTPS (Electronic Federal Tax Payment System), See instructions. 3c \$ 140,0								
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LHA For Privacy Act and Paperwork Reduction Act Notice, see instructions. Form 8868 (Rev. 1-2014)	LHA F		d Paperwork Reduction Act Notice,	see instr	uctions.		Form 8	868 (Rev 1-2014)	