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Form **990-PF**Department of the Treasury
Internal Revenue Service

Section of Private Foundation

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

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Information about Form 990-PF and its separate instructions is 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 J.M.R. BARKER FOUNDATION C/O BALLENTINE PARTNERS, LLC		A Employer identification number 13-6268289
Number and street (or P.O. box number if mail is not delivered to street address) 230 3RD AVENUE, 6TH FLOOR		B Telephone number (781) 314-1300
City or town, state or province, country, and ZIP or foreign postal code WALTHAM, MA 02451		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 checked="" 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) \$ 71,562,108.		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
J Accounting method <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____		

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)
Revenue	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	280,023.	280,023.		STATEMENT 1
	4 Dividends and interest from securities	934,425.	934,425.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)	4,733,337.			
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a	13,670,546.			
	7 Capital gain net income (from Part IV, line 2)		4,733,337.		
	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	<1,600.>	<1,600.>		STATEMENT 3	
12 Total. Add lines 1 through 11	5,946,185.	5,946,185.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	125,000.	62,500.		62,500.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees STMT 4	10,253.	2,051.		8,202.
	b Accounting fees STMT 5	46,136.	9,227.		36,909.
	Other professional fees STMT 6	103,206.	20,641.		82,565.
	17 Interest				
	18 Taxes STMT 7	158,334.	26,578.		4,545.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
23 Other expenses STMT 8	298,072.	259,007.		39,066.	
24 Total operating and administrative expenses. Add lines 13 through 23	741,001.	380,004.		233,787.	
25 Contributions, gifts, grants paid	2,901,500.			2,409,204.	
26 Total expenses and disbursements. Add lines 24 and 25	3,642,501.	380,004.		2,642,991.	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	2,303,684.				
b Net investment income (if negative, enter -0-)		5,566,181.			
c Adjusted net income (if negative, enter -0-)			N/A		

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LHA For Paperwork Reduction Act Notice, see instructions.

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1	Cash - non-interest-bearing		249,005.	497,954.	497,954.
	2	Savings and temporary cash investments		5,380,804.	3,229,752.	3,229,752.
	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		80,427.	32,618.	32,618.
	10a	Investments - U.S. and state government obligations STMT 11		8,992,013.	8,995,162.	8,995,162.
	b	Investments - corporate stock STMT 12		11,791,977.	11,630,188.	11,630,188.
	c	Investments - corporate bonds				
	11	Investments - land, buildings, and equipment: basis				
	Less: accumulated depreciation					
12	Investments - mortgage loans					
13	Investments - other STMT 13		21,470,067.	20,906,630.	20,906,630.	
14	Land, buildings, and equipment: basis					
	Less: accumulated depreciation					
15	Other assets (describe) STATEMENT 14		23,684,017.	26,269,804.	26,269,804.	
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)		71,648,310.	71,562,108.	71,562,108.	
Liabilities	17	Accounts payable and accrued expenses		31,500.	58,687.	
	18	Grants payable		242,704.	735,000.	
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe) STATEMENT 15		353,881.	364,864.	
23	Total liabilities (add lines 17 through 22)		628,085.	1,158,551.		
Net Assets or Fund Balances	24	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. <input checked="" type="checkbox"/>		71,020,225.	70,403,557.	
	25	Unrestricted				
	26	Temporarily restricted				
	26	Permanently restricted				
		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input type="checkbox"/>				
	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		71,020,225.	70,403,557.	
	31	Total liabilities and net assets/fund balances		71,648,310.	71,562,108.	

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	71,020,225.
2	Enter amount from Part I, line 27a	2	2,303,684.
3	Other increases not included in line 2 (itemize) DEFERRED TAX DEDUCTED ON BOOKS	3	68,419.
4	Add lines 1, 2, and 3	4	73,392,328.
5	Decreases not included in line 2 (itemize) SEE STATEMENT 10	5	2,988,771.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	70,403,557.

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Part IV Capital Gains and Losses for Tax on Investment Income

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e 474,248.			4,733,337.

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			4,733,337.

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 4,733,337.

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	2,893,295.	70,301,840.	.041155
2011	2,952,260.	70,941,318.	.041616
2010	2,527,152.	63,904,105.	.039546
2009	3,184,466.	56,048,510.	.056816
2008	2,747,506.	64,068,228.	.042884

2 Total of line 1, column (d)	2	.222017
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	.044403
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	70,591,425.
5 Multiply line 4 by line 3	5	3,134,471.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	55,662.
7 Add lines 5 and 6	7	3,190,133.
8 Enter qualifying distributions from Part XII, line 4	8	2,642,991.

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.

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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)		1	111,324.
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		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		3	111,324.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
3 Add lines 1 and 2		5	111,324.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		6a	165,979.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		6b	
6 Credits/Payments		6c	
a 2013 estimated tax payments and 2012 overpayment credited to 2013		6d	
b Exempt foreign organizations - tax withheld at source		7	165,979.
c Tax paid with application for extension of time to file (Form 8868)		8	888.
d Backup withholding erroneously withheld		9	
7 Total credits and payments. Add lines 6a through 6d		10	53,767.
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached		11	0.
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax			

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year. (1) On the foundation \$ 0. (2) On foundation managers \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		N/A
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) NY, 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

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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 <u>N/A</u>	13	X	
14	The books are in care of <u>C/O BALLENTINE PARTNERS, LLC</u> Telephone no <u>(781) 314-1300</u> Located at <u>230 3RD AVENUE, 6TH FLOOR, WALTHAM, MA</u> ZIP+4 <u>02451</u>			
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 <u>15</u> <u>N/A</u>			
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 <u></u>	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 checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input 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)? <u></u>	1b	X
Organizations relying on a current notice regarding disaster assistance check here <u></u>		
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? <u></u>	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 <u></u>		
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) <u>N/A</u>	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. <u></u>		
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.) <u>N/A</u>	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? <u></u>	4b	X

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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)? ☐ Yes ☒ No

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? ☐ 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? ☐ Yes ☒ No

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No

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
SEE STATEMENT 16		125,000.	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

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

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

[illegible]

Total number of others receiving over \$50,000 for professional services	0
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Part IX-A	Summary of Direct Charitable Activities
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List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

1	N/A	
2		
3		
4		

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

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

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

Total. Add lines 1 through 3 0.

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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	65,915,117.
b	Average of monthly cash balances	1b	5,751,304.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	71,666,421.
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	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.

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	3,529,571.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	111,324.
b	Income tax for 2013 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	111,324.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	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)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	3,418,247.

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	2,642,991.
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	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 I, 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 qualifies for the section 4940(e) reduction of tax in those years.

Form 990-PF (2013)

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 Enter amount for 2012 only			2,442,125.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2013.				
a From 2008				
b From 2009				
c From 2010				
d From 2011				
e From 2012				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 2,642,991.				
a Applied to 2012, but not more than line 2a			2,442,125.	
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				200,866.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:	0.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income, Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount - see instr.			0.	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				3,217,381.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2014 Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
d Excess from 2012				
e Excess from 2013				

Form 990-PF (2013)

N/A

- ☐ 4942(j)(3) or ☐ 4942(j)(5)

- (4) Gross investment income

[illegible]

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

J.M.R. BARKER FOUNDATION
C/O BALLENTINE PARTNERS, LLC

Form 990-PF (2013)

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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				
AMAZON CONSERVATION TEAM 4211 FAIRFAX DRIVE ARLINGTON, VA 22203	NONE	PUBLIC CHARITY	OPERATING SUPPORT	100,000.
APPALACHIAN MOUNTAIN CLUB 5 JOY STREET BOSTON, MA 02108	NONE	PUBLIC CHARITY	GENERAL SUPPORT	55,000.
AUSTIN PARTNERS IN EDUCATION 1601 RIO GRANDE STREET #300A AUSTIN, TX 78701	NONE	PUBLIC CHARITY	GENERAL SUPPORT & SPECIAL PROJECTS	50,000.
BOSTON LYRIC OPERA 11 AVE DE LAFAYETTE BOSTON, MA 02111	NONE	PUBLIC CHARITY	GENERAL SUPPORT	260,000.
BRATTLEBORO MEMORIAL HOSPITAL 17 BELMONT AVENUE BRATTLEBORO, VT 05301	NONE	PUBLIC CHARITY	GENERAL SUPPORT	350,000.
Total	SEE CONTINUATION SHEET(S) ▶ 3a			2,409,204.
b Approved for future payment				
CONCERNED CITIZENS OF MONTAUK PO BOX 915 MONTAUK, NY 11954	NONE	PUBLIC CHARITY	OPERATING SUPPORT	50,000.
GLOUCESTER EDUCATION FOUNDATION: BAY STATE READING 122 MAIN STREET GLOUCESTER, MA 01930	NONE	PUBLIC CHARITY	GENERAL SUPPORT	60,000.
NORTHFIELD MOUNT HERMON SCHOOL ONE LAMPLIGHTER WAY NORTHFIELD, MA 01354	NONE	PUBLIC CHARITY	SPECIAL PROJECT	25,000.
Total	SEE CONTINUATION SHEET(S) ▶ 3b			735,000.

323611
10-10-13

* * SEE PURPOSE OF GRANT CONTINUATIONS

Form 990-PF (2013)

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
Enter gross amounts unless otherwise indicated.				
1 Program service revenue.				
a				
b				
c				
d				
e				
f				
g Fees and contracts from government agencies				
2 Membership dues and assessments				
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				
b Not debt-financed property				
6 Net rental income or (loss) from personal property				
7 Other investment income		14	<1,600.>	
8 Gain or (loss) from sales of assets other than inventory		18	4,733,337.	
9 Net income or (loss) from special events				
10 Gross profit or (loss) from sales of inventory				
11 Other revenue:				
a				
b				
c				
d				
e				
12 Subtotal. Add columns (b), (d), and (e).	0.		5,946,185.	0.
13 Total. Add line 12, columns (b), (d), and (e).			13 5,946,185.	

(See worksheet in line 13 instructions to verify calculations.)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

[illegible]


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		X
(2)	Other assets		X
b	Other transactions		
(1)	Sales of assets to a noncharitable exempt organization		X
(2)	Purchases of assets from a noncharitable exempt organization		X
(3)	Rental of facilities, equipment, or other assets		X
(4)	Reimbursement arrangements		X
(5)	Loans or loan guarantees		X
(6)	Performance of services or membership or fundraising solicitations		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees		X
d	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received		

[illegible]

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

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

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.		May the IRS discuss this return with the preparer shown below (see Instr.)? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	 Signature of officer or trustee	11/10/14 Date	

Paid Preparer Use Only	Print/Type preparer's name DEBORAH A. HOPKINS	Preparer's signature <i>Deborah A. Hopkins</i>	Date 11/4/14	Check <input type="checkbox"/> if self-employed	PTIN P00167843
	Firm's name ▶ KAHN, LITWIN, RENZA & CO. LTD.			Firm's EIN ▶ 05-0409384	
	Firm's address ▶ 800 SOUTH STREET, SUITE 300 WALTHAM, MA 02453			Phone no. 781-547-8800	

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	FIDELITY INVESTMENTS (1895) - AVAILABLE UPON REQUEST			
b	FIDELITY INVESTMENTS (2466) - AVAILABLE UPON REQUEST			
c	FIDELITY INVESTMENTS (2466) - AVAILABLE UPON REQUEST			
d	FIDELITY INVESTMENTS (3242) - AVAILABLE UPON REQUEST			
e	FIDELITY INVESTMENTS (3242) - AVAILABLE UPON REQUEST			
f	PARTNERSHIP FLOW THROUGH S/T CAP GAIN			
g	PARTNERSHIP FLOW THROUGH L/T CAP GAIN			
h	BASIS ADJUSTMENTS			
i	PARTNERSHIP FLOW THROUGH SEC 1231 GAIN			
j	CAPITAL GAINS DIVIDENDS			
k				
l				
m				
n				
o				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			4,764.
b			62,702.
c			1,553,455.
d			3,149.
e			2,394.
f			101,610.
g			1,727,859.
h			802,008.
i			1,148.
j	474,248.		474,248.
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(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	
a			4,764.
b			62,702.
c			1,553,455.
d			3,149.
e			2,394.
f			101,610.
g			1,727,859.
h			802,008.
i			1,148.
j			474,248.
k			
l			
m			
n			
o			

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	4,733,337.
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

J.M.R. BARKER FOUNDATION
C/O BALLENTINE PARTNERS, LLC

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
BRIDGE FUND OF NY, INC. 271 MADISON AVE # 907 NEW YORK, NY 10016	NONE	PUBLIC CHARITY	GENERAL SUPPORT	10,000.
COLLEGE FORWARD 312 MURRAY STREET MANOR, TX 78653	NONE	PUBLIC CHARITY	IT PROJECT	325,000.
CONCERNED CITIZENS OF MONTAUK P.O. BOX 915 MONTAUK, NY 11954	NONE	PUBLIC CHARITY	GENERAL SUPPORT & MATCHING GRANTS	110,000.
COTTONWOOD GULCH FOUNDATION P.O. BOX 25106 ALBUQUERQUE, NM 87125	NONE	PUBLIC CHARITY	GENERAL SUPPORT & SCHOLARSHIPS	28,000.
E3 ALLIANCE 5930 MIDDLE FISKVILLE ROAD, SUITE 507 AUSTIN, TX 78752	NONE	PUBLIC CHARITY	GENERAL SUPPORT	10,000.
FAMILIES OF SPINAL MUSCULAR ATROPHY 925 BUSSE ROAD ELK GROVE VILLAGE, IL 60007	NONE	PUBLIC CHARITY	OPERATING SUPPORT	10,000.
GLOUCESTER EDUCATION FOUNDATION 122 MAIN STREET GLOUCESTER, MA 01930	NONE	PUBLIC CHARITY	GENERAL SUPPORT, DATING VIOLENCE PROGRAM AND GRANT PROPOSAL VOLUNTEER COORDINATOR & GRANT	60,000.
GLOUCESTER EDUCATION FOUNDATION: BAY STATE READING 122 MAIN STREET GLOUCESTER, MA 01930	NONE	PUBLIC CHARITY	GENERAL SUPPORT	30,000.
KARME CHOLING 369 PATENEAUDE LANE BARNET, VT 05821	NONE	PUBLIC CHARITY	GENERAL SUPPORT	10,000.
KIMBALL UNION ACADEMY 7 CAMPUS CENTER DRIVE MERIDEN, NH 03770	NONE	PUBLIC CHARITY	CAPITAL CAMPAIGN & GENERAL SUPPORT	100,000.
Total from continuation sheets				1,594,204.

**J.M.R. BARKER FOUNDATION
C/O BALLENTINE PARTNERS, LLC**

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
LOCAL FOOD HUB P.O. BOX 4647 CHARLOTTESVILLE, VA 22905	NONE	PUBLIC CHARITY	OPERATING SUPPORT	116,000.
MAIN STREET ARTS 35 MAIN STREET SAXTONS RIVER, VT 05154	NONE	PUBLIC CHARITY	CAPITAL CAMPAIGN	30,000.
NEWTON - WELLESLEY HOSPITAL CHARITY FOUNDATION 2014 WASHINGTON STREET NEWTON, MA 02462	NONE	PUBLIC CHARITY	GENERAL SUPPORT	15,000.
NORTHEASTERN UNIVERSITY: SOCIAL ENTERPRISE INSTITUTE 360 HUNTINGTON AVENUE BOSTON, MA 02115	NONE	PUBLIC CHARITY	CAPSTONE GRANT PROGRAM	37,500.
NORTHFIELD MOUNT HERMON SCHOOL ONE LAMPLIGHTER WAY NORTHFIELD, MA 01354	NONE	PUBLIC CHARITY	GENERAL SUPPORT & FACULTY PROFESSIONAL DEVELOPMENT	50,000.
OPEN DOOR PRESCHOOL 1717 WEST 10TH STREET AUSTIN, TX 78703	NONE	PUBLIC CHARITY	GENERAL SUPPORT	10,000.
PRISON UNIVERSITY PROJECT P.O. BOX 492 SAN QUENTIN, CA 94964	NONE	PUBLIC CHARITY	OPERATING SUPPORT	130,000.
RED GATE FARM EDUCATION CENTER PO BOX 300 BUCKLAND, MA 01338	NONE	PUBLIC CHARITY	GENERAL SUPPORT	5,000.
ROCKPORT CHAMBER MUSIC FESTIVAL 35 MAIN STREET ROCKPORT, MA 01966	NONE	PUBLIC CHARITY	GENERAL SUPPORT, EQUIPMENT REPAIR & LOAN INTEREST	27,704.
SOLI CHAMBER ENSEMBLE P.O. BOX 6062 SAN ANTONIO, TX 78209	NONE	PUBLIC CHARITY	GENERAL SUPPORT	5,000.
Total from continuation sheets				

J.M.R. BARKER FOUNDATION
C/O BALLENTINE PARTNERS, LLC

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
ST ANSELM COLLEGE 100 SAINT ANSELM DRIVE MANCHESTER, NH 03102	NONE	PUBLIC CHARITY	GENERAL SUPPORT & SCHOLARSHIPS	25,000.
THE OPEN DOOR (CAPE ANN FOOD PANTRY & PRESCHOOL) 28 EMERSON AVENUE GLOUCESTER, MA 01930	NONE	PUBLIC CHARITY	GENERAL SUPPORT & FEEDING SUCCESS PROGRAM	10,000.
UNITED WAY GREATER AUSTIN 2000 E MARTIN LUTHER KING JR BLVD AUSTIN, TX 78702	NONE	PUBLIC CHARITY	GENERAL SUPPORT & FINANCIAL EDUCATION COORDINATOR	10,000.
UT HEALTH SCIENCE CENTER SAN ANTONIO 7703 FLOYD CURL DRIVE SAN ANTONIO, TX 78229-3900	NONE	PUBLIC CHARITY	DR JACKSON'S ALS CENTER.	425,000.
WHEELCHAIR SPORTS AND RECREATION 906 HIGHWAY 98 E. DESTIN, FL 32541	NONE	PUBLIC CHARITY	GENERAL SUPPORT	5,000.
Total from continuation sheets				

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3 Grants and Contributions Approved for Future Payment (Continuation)Total from continuation sheets

Part XV Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - GLOUCESTER EDUCATION FOUNDATION

GENERAL SUPPORT, DATING VIOLENCE PROGRAM AND GRANT PROPOSAL VOLUNTEER

COORDINATOR & GRANT PROPOSAL WRITER

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

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
PARTNERSHIP FLOW THROUGH INTEREST	3,141.	3,141.	
VARIOUS ACCOUNTS	276,882.	276,882.	
TOTAL TO PART I, LINE 3	280,023.	280,023.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
PARTNERSHIP FLOW THROUGH DIVIDENDS	266,608.	0.	266,608.	266,608.	
VARIOUS ACCOUNTS	1,142,065.	474,248.	667,817.	667,817.	
TO PART I, LINE 4	1,408,673.	474,248.	934,425.	934,425.	

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
MISCELLANEOUS	<1,600.>	<1,600.>	
TOTAL TO FORM 990-PF, PART I, LINE 11	<1,600.>	<1,600.>	

FORM 990-PF	LEGAL FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	10,253.	2,051.		8,202.
TO FM 990-PF, PG 1, LN 16A	10,253.	2,051.		8,202.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE 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
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE 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
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAX	127,211.	0.		0.
FOREIGN TAXES	22,033.	22,033.		0.
PAYROLL TAXES	9,090.	4,545.		4,545.
TO FORM 990-PF, PG 1, LN 18	158,334.	26,578.		4,545.

FORM 990-PF OTHER EXPENSES STATEMENT 8

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TRAVEL & ENTERTAINMENT	54,757.	27,379.		27,379.
ADMINISTRATIVE EXPENSES	5,094.	0.		5,094.
BUSINESS EXPENSES	6,593.	0.		6,593.
PRECIOUS METALS	25,767.	25,767.		0.
INVESTMENT EXPENSES	205,861.	205,861.		0.
TO FORM 990-PF, PG 1, LN 23	298,072.	259,007.		39,066.

FOOTNOTES

STATEMENT 9

GRANTS PAID OUT DURING THE YEAR	2,409,204.
LESS PY GRANTS PAYABLE	242,704.
ADD CY GRANTS PAYABLE	735,000.
GRANT EXPENSE PER BOOKS	2,901,500.

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	10
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DESCRIPTION	AMOUNT
BOOK-TAX DIFFERENCE IN ACTIVITY FROM FLOW-THROUGHS	421,297.
UNREALIZED APPRECIATION ON INVESTMENTS	2,567,474.
TOTAL TO FORM 990-PF, PART III, LINE 5	2,988,771.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	11
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
US TREASURY BONDS	X		8,995,162.	8,995,162.
TOTAL U.S. GOVERNMENT OBLIGATIONS			8,995,162.	8,995,162.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			8,995,162.	8,995,162.

FORM 990-PF	CORPORATE STOCK	STATEMENT	12
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
EQUITIES	11,630,188.	11,630,188.
TOTAL TO FORM 990-PF, PART II, LINE 10B	11,630,188.	11,630,188.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	13
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
OTHER INVESTMENTS	COST	18,865,973.	18,865,973.
AUSTRALIAN GOVERNMENT BONDS	COST	2,040,657.	2,040,657.
TOTAL TO FORM 990-PF, PART II, LINE 13		20,906,630.	20,906,630.

FORM 990-PF	OTHER ASSETS	STATEMENT 14
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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
INVESTMENT IN MUTUAL FUNDS	23,545,128.	26,140,073.	26,140,073.
INTEREST RECEIVABLES	138,889.	129,731.	129,731.
TOTAL TO FORM 990-PF, PART II, LINE 15	23,684,017.	26,269,804.	26,269,804.

FORM 990-PF	OTHER LIABILITIES	STATEMENT 15
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DESCRIPTION	BOY AMOUNT	EOY AMOUNT
DEFERRED TAX LIABILITY	353,881.	285,462.
ACCRUED TAXES	0.	79,402.
TOTAL TO FORM 990-PF, PART II, LINE 22	353,881.	364,864.

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 16

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
JAMES R. BARKER 10 NAOMI DRIVE GLOUCESTER, MA 01930	VP, CIO & DIRECTOR 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.	0.
MARGARET BARKER CLARK P.O. BOX 743 SAXTONS RIVER, VT 05154	PRESIDENT & DIRECTOR 0.50	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 & DIRECTOR 2.00	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 BALLENTINE

13-6268289

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 (8/1/13 - 12/31/13)
10.00

0. 0. 0.

SUSANNE SELARNO
255 STATE STREET
BOSTON, MA 02109

SECRETARY (1/1/13 - 7/31/13)
2.00

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.

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

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

• If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

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

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions. J.M.R. BARKER FOUNDATION	Enter filer's identifying number, see instructions. Employer identification number (EIN) or
	C/O BALLENTINE PARTNERS, LLC	13-6268289
	Number, street, and room or suite no. If a P.O. box, see instructions. 230 3RD AVENUE, 6TH FLOOR	Social security number (SSN)
	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)

04

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

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

- 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 the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

- 4 I request an additional 3-month extension of time until **NOVEMBER 15, 2014**.
- 5 For calendar year **2013**, or other tax year beginning , and ending .
- 6 If the tax year entered in line 5 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
☐ Change in accounting period

- 7 State in detail why you need the extension
ADDITIONAL TIME AND INFORMATION ARE NECESSARY IN ORDER TO PREPARE AN ACCURATE RETURN.

8a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	\$	165,979.
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 and any amount paid previously with Form 8868.	8b	\$	165,979.
c Balance due. Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	\$	0.

Signature and Verification must be completed for Part II only.

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

Signature **Robert H. Hines** Title **CPA**

Date **8/8/14**
Form 8868 (Rev. 1-2014)

Application for Extension of Time To File an Exempt Organization Return

OMB No 1545-1709

Department of the Treasury
Internal Revenue Service

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

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

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

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

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

Part I only ☐

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

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions. J.M.R. BARKER FOUNDATION C/O BALLENTINE PARTNERS, LLC	Enter filer's identifying number Employer identification number (EIN) or 13-6268289
	Number, street, and room or suite no. If a P.O. box, see instructions. 230 3RD AVENUE, 6TH FLOOR	Social security number (SSN)
	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) **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

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 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 (8 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	\$ 165,979.
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	\$ 25,979.
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	\$ 140,000.

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.