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Form 990-PF



Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013, or tax year beginning 01-01-2013 , and ending 12-31-2013

Name of foundation HOFFMAN FAMILY FOUNDATION STEPHEN MOORE & ROGER THOMAS TRUSTEES		A Employer identification number 22-2677966	
Number and street (or P O box number if mail is not delivered to street address) LWC 230 CONGRESS ST 12FL		B Telephone number (see instructions) (617) 523-6531	
City or town, state or province, country, and ZIP or foreign postal code BOSTON, MA 02110		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <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)▶\$ 3,698,243		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 checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(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 (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	55	46		
	4 Dividends and interest from securities.	70,248	69,895		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	120,490			
	b Gross sales price for all assets on line 6a 699,755				
	7 Capital gain net income (from Part IV, line 2) . . .		120,490		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	 870	0		
	12 Total. Add lines 1 through 11	191,663	190,431		
	13 Compensation of officers, directors, trustees, etc	14,876	9,918		4,958
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	 3,708	3,708		0
	c Other professional fees (attach schedule)	 12,272	10,772		1,500
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	 3,962	2,389		0
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	 73	38		35
	24 Total operating and administrative expenses. Add lines 13 through 23	34,891	26,825		6,493
	25 Contributions, gifts, grants paid	431,500			431,500
	26 Total expenses and disbursements. Add lines 24 and 25	466,391	26,825		437,993
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-274,728			
	b Net investment income (if negative, enter -0-)		163,606		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	713	208	208
	2	Savings and temporary cash investments	93,000	59,000	59,000
	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 (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	2,112,880	1,872,657	3,639,035
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	15	Other assets (describe ▶ _____)			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	2,206,593	1,931,865	3,698,243
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	2,523,069	2,301,435	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	-316,476	-369,570	
	30	Total net assets or fund balances (see page 17 of the instructions)	2,206,593	1,931,865	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	2,206,593	1,931,865	

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	2,206,593
2	Enter amount from Part I, line 27a	2	-274,728
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	1,931,865
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	1,931,865

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)
1 a	PUBLICLY TRADED SECURITIES	P		
b				
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 699,755		579,265	120,490
b			
c			
d			
e			

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

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			120,490
b			
c			
d			
e			

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	120,490
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) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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 page 18 of 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	387,451	3,150,111	0 122996
2011	381,309	3,287,338	0 115993
2010	373,035	3,279,314	0 113754
2009	351,102	3,157,935	0 111181
2008	435,809	4,266,230	0 102153

2 Total of line 1, column (d).	2	0 566077
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	0 113215
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	3,343,494
5 Multiply line 4 by line 3.	5	378,534
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	1,636
7 Add lines 5 and 6.	7	380,170
8 Enter qualifying distributions from Part XII, line 4. 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	8	437,993

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)		
1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1		
Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	1,636
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	0
3 Add lines 1 and 2.	3	1,636
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	0
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-	5	1,636
6 Credits/Payments		
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	1,520
b Exempt foreign organizations—tax withheld at source	6b	
c Tax paid with application for extension of time to file (Form 8868)	6c	
d Backup withholding erroneously withheld	6d	
7 Total credits and payments Add lines 6a through 6d.	7	1,520
8 Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	8	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	116
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11 Enter the amount of line 10 to be Credited to 2014 estimated tax <input checked="" type="checkbox"/> Refunded <input checked="" type="checkbox"/>	11	

Part VII-A Statements Regarding Activities			
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?	1a	Yes	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? <i>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.</i>	1b		No
c Did the foundation file Form 1120-POL for this year?.	1c		No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input checked="" type="checkbox"/> \$ 0 (2) On foundation managers <input checked="" type="checkbox"/> \$ 0			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input checked="" type="checkbox"/> \$ 0			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2		No
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? <i>If "Yes," attach a conformed copy of the changes</i>	3		No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?.	4a		No
b If "Yes," has it filed a tax return on Form 990-T for this year?.	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5		No
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?	6	Yes	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" type="checkbox"/> MA			
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation .</i>	8b	Yes	
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)? <i>If "Yes," complete Part XIV</i>	9		No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10		No

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		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address N/A				
14	The books are in care of LORING WOLCOTT COOLIDGE TRUST LLC Telephone no (617) 523-6531 Located at 230 CONGRESS STREET BOSTON MA ZIP+4 02110			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here and enter the amount of tax-exempt interest received or accrued during the year.	15		
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?	16	Yes	No
See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country				

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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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).			
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 page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? If "Yes," list the years 20 , 20 , 20 , 20			
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).	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 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?			
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.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b		No

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))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? (see instructions).	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)?	5b		
	Organizations relying on a current notice regarding disaster assistance check here.	<input type="checkbox"/>		
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?	<input type="checkbox"/> Yes <input type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(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
STEPHEN A MOORE	TRUSTEE	7,438	0	0
3 DENNETT ROAD WINCHESTER, MA 01890	3 00			
ROGER M THOMAS	TRUSTEE	7,438	0	0
10 LONGWOOD DRIVE APT 228 WESTWOOD, MA 02090	3 00			
JOHN E HOFFMAN JR	TRUSTEE	0	0	0
279 BOWLDER RD SULLIVAN, NH 03445	0 00			
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). 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 (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		0

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	0
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	0
2	
All other program-related investments. See page 24 of the instructions.	
3	
Total. Add lines 1 through 3.	0

Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	3,338,441
b	Average of monthly cash balances.	1b	55,969
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	3,394,410
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	3,394,410
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	50,916
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,343,494
6	Minimum investment return. Enter 5% of line 5.	6	167,175

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	167,175
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	1,636
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,636
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	165,539
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	165,539
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	165,539

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	437,993
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	437,993
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 (see instructions).	5	1,636
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	436,357
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				165,539
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2013				
a From 2008.	232,795			
b From 2009.	194,467			
c From 2010.	215,033			
d From 2011.	221,648			
e From 2012.	232,925			
f Total of lines 3a through e.	1,096,868			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 437,993				
a Applied to 2012, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2013 distributable amount.				165,539
e Remaining amount distributed out of corpus	272,454			
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	1,369,322			
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 instructions.			0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014.				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).	0			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions).	232,795			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a.	1,136,527			
10 Analysis of line 9				
a Excess from 2009.	194,467			
b Excess from 2010.	215,033			
c Excess from 2011.	221,648			
d Excess from 2012.	232,925			
e Excess from 2013.	272,454			

Part XIV

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling. . . .

Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2013	(b) 2012	(c) 2011	(d) 2010	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c "Support" alternative test—enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV **Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)**

1 Information Regarding Foundation Managers:

■ List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

• List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number of the person to whom applications should be addressed

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

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	431,500
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)

Part XVII

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

1

Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a

Transfers from the reporting foundation to a noncharitable exempt organization of

(1)

Cash.

(2)

Other assets.

b

Other transactions

(1)

Sales of assets to a noncharitable exempt organization.

(2)

Purchases of assets from a noncharitable exempt organization.

(3)

Rental of facilities, equipment, or other assets.

(4)

Reimbursement arrangements.

(5)

Loans or loan guarantees.

(6)

Performance of services or membership or fundraising solicitations.

c

Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

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.

Yes

No

1a(1)

No

1a(2)

No

1b(1)

No

1b(2)

No

1b(3)

No

1b(4)

No

1b(5)

No

1b(6)

No

1c

No

(a) Line No	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

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

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 or fiduciary) is based on all information of which preparer has any knowledge.

Signature of officer or trustee

2014-05-07

Date

Title

May the IRS discuss this return with the preparer shown below (see instr.)?

Yes

No

Paid Preparer Use Only

Print/Type preparer's name

MARY-JEAN MOUGHAN

Preparer's Signature

Date

Check if self-employed

PTIN

P00133963

Firm's name

LORING WOLCOTT & COOLIDGE TRUST LLC

Firm's EIN

27-3396508

Firm's address


230 CONGRESS STREET BOSTON, MA 021102437

Phone no


(617) 523-6531

Form 990-PF (2013)


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a Paid during the year				
APPLE HILL CENTER FOR CHAMBER MUSIC APPLE HILL ROAD PO BOX 217 SULLIVAN,NH 03445	NONE	PC	OPERATING SUPPORT	25,000
ARTS ALIVE INC 39 CENTRAL SQUARE SUITE 203 KEENE,NH 03431	NONE	PC	OPERATING SUPPORT	10,000
BIG BROTHERS BIG SISTERS OF WESTERN NEW HAMPSHIRE 68 CASTLE STREET KEENE,NH 03431	NONE	PC	GENERAL	2,000
CEDARCREST INC 91 MAPLE AVENUE KEENE,NH 03431	NONE	PC	GENERAL	1,000
CHESHIRE HEALTH FOUNDATION 580 COURT STREET KEENE,NH 03431	NONE	PC	VISION,KIDS DEMAR MARATHON,PALLIATIVE CARE PROGRAM	47,000
COLONIAL THEATER GROUP 95 MAIN STREET KEENE,NH 03431	NONE	PC	GENERAL	14,000
CONSERVATION LAW FOUNDATION 27 NORTH MAIN STREET CONCORD,NH 03301	NONE	PC	GENERAL	1,000
COMMUNITY CONNECTIONS FOR AFTERSCHOOL NETWORKING 25 ROXBURY STREET SUITE B KEENE,NH 03431	NONE	PC	OPERATING SUPPORT	20,000
ERIC CARLE MUSEUM OF PICTURE BOOK ART 125 WEST BAY ROAD AMHERST,MA 01002	NONE	PC	GENERAL	1,000
FIRST CONGREGATIONAL CHURCH OF SOUTH HADLEY MA ONE CHURCH STREET SOUTH HADLEY,MA 01075	NONE	PC	OUTREACH PROGRAM,HABITAT FOR HUMANITY AND GIRLS INC	3,000
GRANITE STATE MONARCHS DBA PEER AGENCY PO BOX 258 64 BEAVER STREET KEENE,NH 03431	NONE	PC	GENERAL	10,000
HARRIS CENTER FOR CONSERVATION EDUCATION 83 KINGS HIGHWAY HANCOCK,NH 03449	NONE	PC	GENERAL	1,000
HOME HEALTHCARE HOSPICE AND COMMUNITY SERVICES PO BOX 564 KEENE,NH 03431	NONE	PC	OPERATING SUPPORT,BUTTERFLY GARDEN, COMMUNITY SERVICE, B R DUCKETT SCHOLARSHIP	16,000
HUNDRED NIGHTS INC PO BOX 833 17 LAMSON STREET KEENE,NH 03431	NONE	PC	OPERATING SUPPORT, LEADERSHIP TRANSITION COACHING	8,000
KEENE CHAMBER ORCHESTRA PO BOX 88 APPLE HILL ROAD E SULLIVAN,NH 03445	NONE	PC	GENERAL	1,000
Total  3a				431,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a Paid during the year				
KEENE FAMILY YMCA 38 ROXBURY ST KEENE,NH 03431	NONE	PC	GENERAL	1,000
KEENE STATE COLLEGE 229 MAIN STREET KEENE,NH 03431	NONE	PC	COHEN CENTER FOR HOLOCAUST STUDIES, 1909 SOCIETY LEGISLATIVE INITIATIVE	3,000
LEUKEMIA AND LYMPHOMA SOCIETY 9 ERIE DRIVE NATICK,MA 01760	NONE	PC	GENERAL	4,000
MAPS COUNSELING SERVICES 19 FEDERAL STREET KEENE,NH 03431	NONE	PC	GENERAL	25,000
MASTERS SCHOOL 49 CLINTON AVENUE DOBBS FERRY,NY 10522	NONE	PC	GENERAL	2,000
MONADNOCK CENTER FOR VIOLENCE PREVENTION 12 COURT ST KEENE,NH 03431	NONE	PC	GENERAL	5,000
MONADNOCK CONSERVANCY PO BOX 337 KEENE,NH 03431	NONE	PC	GENERAL	1,000
MONADNOCK FAMILY SERVICES 17 93RD STREET KEENE,NH 03431	NONE	PC	GENERAL OPERATING SUPPORT	25,000
MONADNOCK MUSIC 2A CONCORD STREET PETERBOROUGH,NH 03458	NONE	PC	GENERAL	1,000
MONADNOCK UNITED WAY 23 CENTER STREET KEENE,NH 03431	NONE	PC	GENERAL	35,000
MOVING COMPANY DANCE CENTER DBA MOCO ARTS 76 RAILROAD STREET KEENE,NH 03431	NONE	PC	OPERATING SUPPORT & PROFESSIONAL PERFORMANCE SERIES,CENTER DBA MOCO ARTS	26,500
NEW HAMPSHIRE CENTER FOR NONPROFITS 10 FERRY STREET SUITE 315 CONCORD,NH 03301	NONE	PC	GENERAL, POLICY INITIATIVE	30,000
NEW HAMPSHIRE CENTER FOR PUBLIC POLICY 1 EAGLE SQUARE 510 CONCORD,NH 03301	NONE	PC	GENERAL	1,000
NEW HAMPSHIRE CHARITABLE FOUNDATION 37 PLEASANT STREET CONCORD,NH 03301	NONE	PC	GENERAL	70,000
NEW HAMPSHIRE COMMUNITY LOAN FUND 7 WALL STREET CONCORD,NH 03301	NONE	PC	GENERAL OPERATING SUPPORT	1,000
Total  3a				431,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
NEW HAMPSHIRE HISTORICAL SOCIETY 30 PARK STREET CONCORD,NH 03301	NONE	PC	GENERAL	1,000
NEW HAMPSHIRE HUMANITIES COUNCIL 117 PLEASANT STREET CONCORD,NH 03301	NONE	PC	CONSTITUTIONALLY SPEAKING PROJECT	6,000
NEW HAMPSHIRE PUBLIC RADIO INC 207 NORTH MAIN STREET CONCORD,NH 03301	NONE	PC	GENERAL	5,000
PETERBOROUGH PLAYERS 55 STEARNS FARM ROAD PETERBOROUGH,NH 03458	NONE	PC	THE MET/LIVE IN HD OPERA	1,000
PRINCETON UNIVERSITY 330 ALEXANDEWR ST PRINCETON,NJ 08540	NONE	PC	GENERAL	1,000
SARAH LAWRENCE COLLEGE 1 MEAD WAY BRONXVILLE,NH 10708	NONE	PC	GENERAL	1,000
SOCIETY FOR THE PROTECTION OF NH FORESTS 54 PORTSMOUTH STREET CONCORD,NH 03301	NONE	PC	GENERAL	5,000
THE COMMUNITY KITCHEN 35-37 MECHANIC STREET KEENE,NH 03431	NONE	PC	GENERAL	1,000
THE NATURE CONSERVANCY 22 BRIDGE STREET 4TH FLOOR CONCORD,NH 03301	NONE	PC	GENERAL	2,000
TRICINIUM LTD 191 WASHINGTON ST KEENE,NH 034313154	NONE	PC	KADDISH PROJECT	10,000
UNITED CONGREGATIONAL CHURCH OF SULLIVAN PO BOX 73 SULLIVAN,NH 03445	NONE	PC	OPERATING SUPPORT,CAPITAL WINDOWS	8,000
Total  3a				431,500

TY 2013 Accounting Fees Schedule

Name: HOFFMAN FAMILY FOUNDATION

STEPHEN MOORE & ROGER THOMAS TRUSTEES

EIN: 22-2677966

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LORING, WOLCOTT & COOLIDGE TRUST LLC	3,708	3,708		0

TY 2013 General Explanation Attachment

Name: HOFFMAN FAMILY FOUNDATION

STEPHEN MOORE & ROGER THOMAS TRUSTEES

EIN: 22-2677966

Identifier	Return Reference	Explanation
	PART VIII LINE 1(B)	990PF STATEMENTPART VIII OFFICERS, DIRECTORS, TRUSTEES, FOUNDATION MANAGERSAND THEIR COMPENSATION AND HOURS SPENT PER WEEK HOURS SPENT THE TIME SPENT BY THE TRUSTEE/S MANAGING THE AFFAIRS OF THEFOUNDATION VARIES FROM WEEK TO WEEK AND YEAR TO YEAR FOR990PF REPORTING PURPOSES, AN ESTIMATE OF 1 TO 3 HOURS PERWEEK HAS BEEN INDICATED THE TRUSTEE/S ARE PROFESSIONALFIDUCIARIES WHO MANAGE A NUMBER OF TRUST/FOUNDATIONRELATIONSHIPS AND WHO EMPLOY ACCOUNTING, SUPPORT AND TAXCOMPLIANCE STAFF TO ASSIST WITH THE ADMINISTRATION OF SAIDRELATIONSHIPS THE 1 TO 3 HOUR TIME NOTED REFLECTS ANESTIMATE OF THE TIME SPENT BY THE NAMED TRUSTEE/S AS WELL ASTHEIR AGENTS OR EMPLOY S THE ACTUAL TIME SPENT MAY DIFFERFROM THE ESTIMATE IN ANY GIVEN WEEK/YEAR THE TRUSTEES FEES NOTED ALSO INCLUDES AN INVESTMENT ADVISORY COMPONENT WHICH IS BASED IN PART ON THE FOUNDATION INVESTMENTASSETS AND WHICH VARIES FROM QUARTER TO QUARTER BASED ONFAIR MARKET VALUE

TY 2013 Investments Corporate
Stock Schedule

Name: HOFFMAN FAMILY FOUNDATION
STEPHEN MOORE & ROGER THOMAS TRUSTEES
EIN: 22-2677966

Name of Stock	End of Year Book Value	End of Year Fair Market Value
2725 ABBOTT LABORATORIES	21,516	104,449
1950 AUTOMATIC DATA PROCESSING	14,423	157,558
1550 COLGATE PALMOLIVE CO	36,520	101,076
1225 CONOCOPHILLIPS INC	56,891	86,546
1100 JOHNSON & JOHNSON	15,702	100,749
3575 MICROSOFT CORP	22,344	133,741
1912 NESTLE SA SPONS ADR FOR REG	56,106	140,387
875 PEPSICO INC	12,139	72,573
1525 QUALCOMM INC	34,278	113,231
1900 STRYKER CORP	18,330	142,766
1075 EXXON MOBIL CORP	99,817	108,790
1175 UNITED TECHNOLOGIES	75,510	133,715
1825 HEINEKEN HOLDING NV	98,724	115,641
1375 ACCENTURE LTD	46,384	113,053
2500 CANADIAN NATIONAL RAILWAY	78,791	142,550
1525 RECKITT BENCKISER GROUP PLC	75,549	121,061
825 MCDONALDS CORP	50,535	80,050
1850 COCA-COLA CO	49,525	76,424
3825 TJX COMPANIES	87,126	243,767
325 MASTERCARD INC	67,035	271,525
3300 FISERV INC	100,117	194,865
1075 JARDINE MATHESON HOLDING LTD	49,891	56,233
1600 UNILEVER PLC SPONSORED ADR	50,205	65,920
90 APPLE INC	51,515	50,492
925 CHURCH & DWIGHT CO	49,771	61,309
575 EOG RESOURCES	66,596	96,508
950 EMERSON ELECTRIC CO	49,549	66,671
825 INTUIT	49,417	62,964
875 CSL LIMITED	49,309	53,983
1075 DANAHER CORP SHS BEN INT	74,505	82,990

Name of Stock	End of Year Book Value	End of Year Fair Market Value
275 GRAINGER(WW) INC	73,679	70,241
600 PRAXAIR INC	70,774	78,018
875 WEX INC	70,589	86,651
750 ROCHE HOLDINGS LTD SPONS ADR	49,495	52,538

TY 2013 Other Expenses Schedule

Name: HOFFMAN FAMILY FOUNDATION

STEPHEN MOORE & ROGER THOMAS TRUSTEES

EIN: 22-2677966

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
COMM OF MA FORM PC ANNUAL REPORT FILING FEE	35	0		35
INVESTMENT EXPENSE	38	38		0

TY 2013 Other Income Schedule

Name: HOFFMAN FAMILY FOUNDATION
STEPHEN MOORE & ROGER THOMAS TRUSTEES
EIN: 22-2677966

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
2012 O/P TO 2013 FED ESTIMATES	870		870

TY 2013 Other Professional Fees Schedule**Name:** HOFFMAN FAMILY FOUNDATION

STEPHEN MOORE & ROGER THOMAS TRUSTEES

EIN: 22-2677966

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LWC FIDUCIARY ADVISORS FEE	10,772	10,772		0
LORING WOLCOTT & COOLIDGE TRUST LLC - TAX PREPARATION FEE	1,500	0		1,500

TY 2013 Taxes Schedule**Name:** HOFFMAN FAMILY FOUNDATION

STEPHEN MOORE & ROGER THOMAS TRUSTEES

EIN: 22-2677966

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
2012 O/P TO 2013 ESTIMATED FEDERAL EXCISE TAX	870	0		0
2013 ESTIMATED FEDERAL EXCISE TAX	650	0		0
FOREIGN TAX PAID	2,442	2,389		0