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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

Do not enter Social Security numbers on this form as it may be made public. By law, the IRS cannot redact the information on the form.

Information about Form 990-PF and its instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

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 MERCK FAMILY FUND		<b>A Employer identification number</b>  22-6063382	
Number and street (or P O box number if mail is not delivered to street address) 95 ELIOT STREET SUITE 2		<b>B Telephone number</b> (see instructions)  (617) 696-3580	
City or town, state or province, country, and ZIP or foreign postal code MILTON, MA 02186		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>	
<b>G</b> 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		<b>D 1.</b> Foreign organizations, check here <input type="checkbox"/> <b>2.</b> Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
<b>H</b> 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		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
<b>I</b> Fair market value of all assets at end of year (from Part II, col. (c), line 16) <b>\$</b> 60,170,939		<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
<b>J</b> Accounting method <input type="checkbox"/> Cash <input checked="" 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)	14,971			
	2 Check <input type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B				
	3 Interest on savings and temporary cash investments	708	708		
	4 Dividends and interest from securities. . . . .	978,310	1,025,967		
	5a Gross rents . . . . .				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	2,179,202			
	b Gross sales price for all assets on line 6a 28,655,672				
	7 Capital gain net income (from Part IV, line 2) . . .		2,179,202		
	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) (attach schedule) . . . . .				
	11 Other income (attach schedule) . . . . .		1,225,400		
	12 <b>Total.</b> Add lines 1 through 11 . . . . .	3,173,191	4,431,277	0	
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	231,295	11,565	0	219,731
	14 Other employee salaries and wages . . . . .	101,344	8,327	0	93,017
	15 Pension plans, employee benefits . . . . .	41,688	3,426	0	38,262
	16a Legal fees (attach schedule) . . . . .				
	b Accounting fees (attach schedule) . . . . .	15,450	0	0	15,450
	c Other professional fees (attach schedule) . . . . .	457,498	607,548	0	0
	17 Interest . . . . .				
	18 Taxes (attach schedule) (see instructions)	289,772	899	0	17,354
	19 Depreciation (attach schedule) and depletion . . .	4,784	0	0	
	20 Occupancy . . . . .	30,614	0	0	30,614
	21 Travel, conferences, and meetings . . . . .	11,814	0	0	11,814
	22 Printing and publications . . . . .	16,412	0	0	16,412
	23 Other expenses (attach schedule) . . . . .	128,401	0	0	128,401
	24 <b>Total operating and administrative expenses.</b> Add lines 13 through 23 . . . . .	1,329,072	631,765	0	571,055
	25 Contributions, gifts, grants paid . . . . .	2,314,221			2,483,771
	26 <b>Total expenses and disbursements.</b> Add lines 24 and 25	3,643,293	631,765	0	3,054,826
	27 Subtract line 26 from line 12				
	a <b>Excess of revenue over expenses and disbursements</b>	-470,102			
	b <b>Net investment income</b> (if negative, enter -0-)		3,799,512		
	c <b>Adjusted net income</b> (if negative, enter -0-)			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 . . . . .	268,984	291,184	291,184
	2	Savings and temporary cash investments . . . . .	1,720,583	1,697,408	1,697,408
	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 . . . . .	6,189	9,471	9,471
	10a	Investments—U S and state government obligations (attach schedule)	3,006,705	 2,096,246	2,096,246
	b	Investments—corporate stock (attach schedule) . . . . .	30,404,860	 36,123,581	36,123,581
	c	Investments—corporate bonds (attach schedule). . . . .	5,504,689	 6,552,388	6,552,388
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans . . . . .			
	13	Investments—other (attach schedule) . . . . .	10,137,547	 13,184,030	13,184,030
	14	Land, buildings, and equipment basis ▶ _____ 24,269 Less accumulated depreciation (attach schedule) ▶ 19,859	5,096	 4,410	4,410
Liabilities	15	Other assets (describe ▶ _____)	 184,940	 212,221	 212,221
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	51,239,593	60,170,939	60,170,939
	17	Accounts payable and accrued expenses . . . . .	40,067	150,398	
	18	Grants payable . . . . .	654,550	485,000	
	19	Deferred revenue . . . . .			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule) . . . . .			
Net Assets or Fund Balances	22	Other liabilities (describe ▶ _____)	 125,300	 312,400	
	23	Total liabilities (add lines 17 through 22) . . . . .	819,917	947,798	
		Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted . . . . .	50,419,676	59,223,141	
	25	Temporarily restricted . . . . .			
	26	Permanently restricted . . . . .			
		Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds . . . . .			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions) . . . . .	50,419,676	59,223,141	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions) . . . . .	51,239,593	60,170,939	

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	50,419,676
2	Enter amount from Part I, line 27a . . . . .	2	-470,102
3	Other increases not included in line 2 (itemize) ▶ 	3	9,375,520
4	Add lines 1, 2, and 3 . . . . .	4	59,325,094
5	Decreases not included in line 2 (itemize) ▶ 	5	101,953
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	6	59,223,141

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	VARIOUS INVESTMENTS		2013-01-01	2013-12-31
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 28,655,672		26,476,470	2,179,202
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			2,179,202
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	2,179,202
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	3,235,058	49,781,403	0 064985
2011	3,397,107	51,886,795	0 065472
2010	3,769,039	51,769,826	0 072804
2009	4,099,639	46,329,874	0 088488
2008	4,580,628	57,390,265	0 079815

2 Total of line 1, column (d). . . . .	2	0 371564
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 074313
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5. . . . .	4	54,920,039
5 Multiply line 4 by line 3. . . . .	5	4,081,273
6 Enter 1% of net investment income (1% of Part I, line 27b). . . . .	6	37,995
7 Add lines 5 and 6. . . . .	7	4,119,268
8 Enter qualifying distributions from Part XII, line 4. . . . .	8	3,060,483

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

<b>Part VI    Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)</b>			
<b>1a</b> 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>b</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 . . . . .		<b>1</b>	75,990
<b>c</b> All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
<b>2</b> Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		<b>2</b>	0
<b>3</b> Add lines 1 and 2. . . . .		<b>3</b>	75,990
<b>4</b> Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		<b>4</b>	0
<b>5</b> <b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0- . . . . .		<b>5</b>	75,990
<b>6</b> Credits/Payments			
<b>a</b> 2013 estimated tax payments and 2012 overpayment credited to 2013	<b>6a</b>	66,031	
<b>b</b> Exempt foreign organizations—tax withheld at source . . . . .	<b>6b</b>		
<b>c</b> Tax paid with application for extension of time to file (Form 8868)	<b>6c</b>		
<b>d</b> Backup withholding erroneously withheld . . . . .	<b>6d</b>		
<b>7</b> Total credits and payments. Add lines 6a through 6d. . . . .		<b>7</b>	66,031
<b>8</b> Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached		<b>8</b>	124
<b>9</b> <b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> . . . . . <input type="checkbox"/>		<b>9</b>	10,083
<b>10</b> <b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> . . . <input type="checkbox"/>		<b>10</b>	
<b>11</b> Enter the amount of line 10 to be <b>Credited to 2014 estimated tax</b> <input type="checkbox"/> <b>Refunded</b> <input type="checkbox"/>		<b>11</b>	

<b>Part VII-A    Statements Regarding Activities</b>			
<b>1a</b> 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? . . . . .		<b>Yes</b>	<b>No</b>
	<b>1a</b>		<b>No</b>
<b>b</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>			<b>No</b>
	<b>1b</b>		<b>No</b>
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year?. . . . .	<b>1c</b>		<b>No</b>
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: <b>(1)</b> On the foundation <input type="checkbox"/> \$ _____ 0 <b>(2)</b> On foundation managers <input type="checkbox"/> \$ _____ 0			
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____ 0			
<b>2</b> 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>	<b>2</b>		<b>No</b>
<b>3</b> 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> . . . . .	<b>3</b>		<b>No</b>
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year?. . . . .	<b>4a</b>		<b>No</b>
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year?. . . . .	<b>4b</b>		
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . . <i>If "Yes," attach the statement required by General Instruction T.</i>	<b>5</b>		<b>No</b>
<b>6</b> 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? . . . . .	<b>6</b>	<b>Yes</b>	
<b>7</b> 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>	<b>7</b>	<b>Yes</b>	
<b>8a</b> Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> MA _____			
<b>b</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>	<b>8b</b>	<b>Yes</b>	
<b>9</b> 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> . . . . .	<b>9</b>		<b>No</b>
<b>10</b> Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	<b>10</b>		<b>No</b>

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? Website address ▶MERCKFF.ORG	13	Yes	
14	The books are in care of ▶THE MERCK FAMILY FUND Telephone no ▶(617) 696-3580 Located at ▶95 ELIOT STREET SUITE 2 MILTON MA ZIP +4 ▶02186			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —Check here . . . . . ▶ <input type="checkbox"/> 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? See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country ▶	16	Yes	No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?. . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? ( <b>Exception.</b> 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 <b>any</b> 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. . . . . ▶ <input type="checkbox"/>	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?. . . . .	1c		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?. . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is <b>not</b> 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 <b>all</b> years listed, answer "No" and attach statement—see instructions ). . . . .	2b		
c	If the provisions of section 4942(a)(2) are being applied to <b>any</b> 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?. . . . . <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? ( <i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.</i> ). . . . .	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 <b>any</b> 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 checked="" 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
See Additional Data Table				
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
JAMES MAGUIRE	DIR OF GRANTS	83,265	34,262	0
95 ELIOT STREET	MGMT/			
MILTON,MA 02186	40 00			
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
PINNACLE ASSOCIATES LTD	PORTFOLIO MANAGER	134,758
335 MADISON AVENUE 11TH FLOOR NEWYORK,NY 10017		
BOSTON COMMON ASSET MANAGEMENT	PORTFOLIO MANAGER	109,185
84 STATE STREET SUITE 1000 BOSTON,MA 02109		
RUTH GOLDMAN	PROGRAM CONSULTANT	65,000
95 ELIOT STREET SUITE 2 MILTON,MA 02186		
CAPITAL GUARDIAN	PORTFOLIO MANAGER	64,333
630 FIFTH AVENUE 36TH FLOOR NEWYORK,NY 10111		
FEDERAL STREET ADVISORS	PORTFOLIO MANAGER	63,750
50 FEDERAL STREET 3RD 84 STATE STREET SUITE 1000 BOSTON,MA 02110		
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 AWARD CHARITABLE GRANTS THAT BENEFIT THE NATURAL ENVIRONMENT AND SOCIALLY/ECONOMICALLY DISADVANTAGED PERSONS 73 GRANTS WERE PAID IN 2013	2,314,221
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	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	53,005,424
b	Average of monthly cash balances. . . . .	1b	2,750,961
c	Fair market value of all other assets (see instructions). . . . .	1c	0
d	Total (add lines 1a, b, and c). . . . .	1d	55,756,385
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	55,756,385
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	4	836,346
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	54,920,039
6	Minimum investment return. Enter 5% of line 5. . . . .	6	2,746,002

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	2,746,002
2a	Tax on investment income for 2013 from Part VI, line 5. . . . .	2a	75,990
b	Income tax for 2013 (This does not include the tax from Part VI ). . . . .	2b	
c	Add lines 2a and 2b. . . . .	2c	75,990
3	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	3	2,670,012
4	Recoveries of amounts treated as qualifying distributions. . . . .	4	0
5	Add lines 3 and 4. . . . .	5	2,670,012
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	2,670,012

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	3,054,826
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	5,657
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	3,060,483
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4. . . . .	6	3,060,483
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				2,670,012
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. . . . .	1,721,835			
b From 2009. . . . .	1,796,975			
c From 2010. . . . .	1,229,146			
d From 2011. . . . .	837,157			
e From 2012. . . . .	812,957			
f Total of lines 3a through e. . . . .	6,398,070			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 3,060,483				
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. . . . .				2,670,012
e Remaining amount distributed out of corpus	390,471			
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	6,788,541			
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). . .	1,721,835			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a . . . . .	5,066,706			
10 Analysis of line 9				
a Excess from 2009. . . .	1,796,975			
b Excess from 2010. . . .	1,229,146			
c Excess from 2011. . . .	837,157			
d Excess from 2012. . . .	812,957			
e Excess from 2013. . . .	390,471			

Part XIVPrivate Operating Foundations (see instructions and Part VII-A, question 9)

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. . . . .

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .	Tax year	Prior 3 years			(e) Total
		(a) 2013	(b) 2012	(c) 2011	(d) 2010	
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 XVSupplementary 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:

a

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) )

NAT CHAMBERLIN

b

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 or e-mail address of the person to whom applications should be addressed

MERCK FAMILY FUND  
95 ELIOT STREET SUITE 2  
MILTON,MA 02186  
(617) 696-3580

b

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

STEP 1 - LETTER OF INQUIRY USING THE ONLINE APPLICATION SYSTEM, STEP 2 - FULL PROPOSAL USING THE ONLINE APPLICATION SYSTEM

c

Any submission deadlines

AUGUST 1 AND FEBRUARY 1

d

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

GRANTS MADE ONLY TO ORGANIZATIONS THAT ARE TAX EXEMPT

Form 990-PF (2013)

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	2,483,771
b Approved for future payment See Additional Data Table				
Total . . . . .			3b	485,000

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

2014-10-28

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  
MATTHEW TROIANO  
CPA

Preparer's Signature

Date  
2014-10-28

Check if self-employed ☒

PTIN  
P01263939

Firm's name  
ALEXANDER ARONSON FINNING & CO PC

Firm's EIN  
04-2571780

Firm's address  
21 EAST MAIN STREET WESTBORO, MA 01581


Phone no  
(508) 366-9100

Form 990-PF (2013)

Form 990PF Part VIII Line 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
JENNY RUSSELL	EXECUTIVE DIRECTOR 40 00	174,619	56,676	0
95 ELIOT STREET SUITE 2 MILTON,MA 02186				
NAT CHAMBERLIN	PRESIDENT 1 00	0	0	0
95 ELIOT STREET SUITE 2 MILTON,MA 02186				
HENRY HATCH	TRUSTEE 1 00	0	0	0
95 ELIOT STREET SUITE 2 MILTON,MA 02186				
ELIZABETH MERCK LAKE	SECRETARY 1 00	0	0	0
95 ELIOT STREET SUITE 2 MILTON,MA 02186				
WHITNEY HATCH	TRUSTEE 1 00	0	0	0
95 ELIOT STREET SUITE 2 MILTON,MA 02186				
ELIZA HATCH	VICE PRESIDENT 1 00	0	0	0
95 ELIOT STREET SUITE 2 MILTON,MA 02186				
KATIE CHAMBERLIN	TRUSTEE 1 00	0	0	0
95 ELIOT STREET SUITE 2 MILTON,MA 02186				
WIL MERCK	TREASURER 1 00	0	0	0
95 ELIOT STREET SUITE 2 MILTON,MA 02186				
IAN HATCH	TRUSTEE 1 00	0	0	0
95 ELIOT STREET SUITE 2 MILTON,MA 02186				
ELLIOTT MERCK	TRUSTEE 1 00	0	0	0
95 ELIOT STREET SUITE 2 MILTON,MA 02186				
SERENA WHITRIDGE	TRUSTEE 1 00	0	0	0
95 ELIOT STREET SUITE 2 MILTON,MA 02186				

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)				
<b>a</b> <i>Paid during the year</i>				
ADDED VALUE AND HERBAN SOLUTIONS INC 370 VAN BRUNT STREET BROOKLYN,NY 11231	GRANTEE	PC	YOUTH EMPOWERMENT PROGRAM	30,000
ALLIANCE FOR AFFORDABLE ENERGY 2372 ST CLAUDE AVE 300A NEWORLEANS,LA 70117	GRANTEE	PC	ENERGY EFFICIENCY FIRST	30,000
APPALACHIAN VOICES 171 GRAND BOULEVARD BOONE,NC 28607	GRANTEE	PC	ENERGY SAVINGS FOR APPALACHIA	35,000
AS YOU SOW 1611 TELEGRAPH AVE OAKLAND,CA 94612	GRANTEE	PC	CONSUMER PACKAGING INITIATIVE	20,000
ASSOCIATED GRANTMAKERS OF MASSACHUSETTS 133 FEDERAL STREET BOSTON,MA 02110	GRANTEE	PC	MEMBERSHIP GRANT	3,150
AUDUBON SOUTH CAROLINA 336 SANCTUARY ROAD HARLEYVILLE,SC 29448	GRANTEE	PC	HABITAT CONSERVATION FORESTED WETLANDS OF SC-BEIDLER FOREST AND OTHER FOREST BLOCKS	35,000
BLUE RIDGE FOREVER 34 WALL STREET ASHEVILLE,NC 288012710	GRANTEE	PC	BLUE RIDGE FOREVER	20,000
BOSTON NATURAL AREAS NETWORK 62 SUMMER ST BOSTON,MA 02110	GRANTEE	PC	YOUTH GROWING CORPS	35,000
BROOKLYN RESCUE MISSION 255 BAINBRIDGE ST BROOKLYN,NY 11233	GRANTEE	PC	GROWING SUCCESS	20,000
CAMDEN CITY GARDEN CLUB INC 3 RIVERSIDE DRIVE CAMDEN,NJ 08103	GRANTEE	PC	URBAN FARMING AND YOUTH EMPLOYMENT AND TRAINING	35,000
CAPITAL DISTRICT COMMUNITY GARDENS 40 RIVER STREET TROY,NY 12180	GRANTEE	PC	THE PRODUCE PROJECT	20,000
CENTER FOR CLIMATE STRATEGIES INC 1800 K STREET NW WASHINGTON,DC 20006	GRANTEE	PC	ENERGY EFFICIENCY IN THE SOUTHEAST	15,000
CENTER FOR ENVIRONMENTAL TRANSFORMATION 1729 FERRY AVENUE CAMDEN,NJ 08104	GRANTEE	PC	GENERAL SUPPORT	25,000
CERES 99 CHAUNCY ST 6TH FL BOSTON,MA 02111	GRANTEE	PC	PROMOTING RISK-AWARE REGULATION TO ACCELERATE ENERGY EFFICIENCY DEPLOYMENT	60,000
CITY GREEN INC 171 GROVE STREET CLIFTON,NJ 07013	GRANTEE	PC	GROWING STRONG URBAN FARM AND MARKET INTERN PROGRAM	30,000
<b>Total . . . . .</b>  <b>3a</b>				2,483,771




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)				
<b>a</b> Paid during the year				
COASTAL CONSERVATION LEAGUE PO BOX 1765 CHARLESTON,SC 294021765	GRANTEE	PC	ENERGY AND CLIMATE PROGRAM	50,000
COMMON GROUND - NEW HAVEN ECOLOGY PROJECT 358 SPRINGSIDE AVENUE NEW HAVEN,CT 06515	GRANTEE	PC	YOUTH LEADERSHIP FOR URBAN FOOD JUSTICE	30,000
CONFLUENCE PHILANTHROPY 475 RIVERSIDE DRIVE NEW YORK,NY 10115	GRANTEE	PC	MEMBERSHIP GRANT	5,000
CONSERVATION LAW FOUNDATION 62 SUMMER ST BOSTON,MA 02110	GRANTEE	PC	ENERGY EFFICIENCY ADVOCACY	50,000
CONSULTATIVE GROUP ON BIOLOGICAL DIVERSITY PRESIDIO BUILDING 1016 SECOND FLOOR SAN FRANCISCO,CA 941290361	GRANTEE	PC	MEMBERSHIP GRANT	4,550
CULTIVATING COMMUNITY 52 MAYO STREET PORTLAND,ME 041013792	GRANTEE	PC	YOUTH & COMMUNITY FARM PROGRAMS	25,000
DOGWOOD ALLIANCE PO BOX 7645 ASHEVILLE,NC 28802	GRANTEE	PC	CARBON CANOPY PROJECT	25,000
ENERGY FOUNDATION 301 BATTERY ST SAN FRANCISCO,CA 94111	GRANTEE	PC	2013 ENERGY EFFICIENCY ADVOCATES CONFERENCE	20,000
ENVIRONMENT NORTHEAST PO BOX 583 ROCKPORT,ME 04856	GRANTEE	PC	ADVANCING ENERGY EFFICIENCY AND RGGI IN THE NORTHEAST	100,000
ENVIRONMENTAL AND ENERGY STUDY INSTITUTE 1112 16TH ST NW WASHINGTON,DC 20036	GRANTEE	PC	ON-BILL FINANCING TAKING IT TO THE NEXT LEVEL	25,000
ENVIRONMENTAL GRANTMAKERS 475 RIVERSIDE DRIVE NEW YORK,NY 10115	GRANTEE	PC	MEMBERSHIP GRANT	6,671
ENVIRONMENTAL PAPER NETWORK 16 EAGLE ST STE 200 ASHEVILLE,NC 28801	GRANTEE	PC	GENERAL SUPPORT	35,000
FEDERATION OF NEIGHBORHOOD CENTERS 1528 WALNUT STREET PHILADELPHIA,PA 19102	GRANTEE	PC	TEENS4GOOD	40,000
FOREST GUILD INC PO BOX 519 SANTA FE,NM 87504	GRANTEE	PC	PHASES 2 & 3 PROMOTE ENERGY EFFICIENCY AND SUSTAINABLE FORESTRY WITH BIOMASS HARVESTING GUIDELINES	40,000
FORESTETHICS 1329 N STATE STREET SUITE 302 BELLINGHAM,WA 98225	GRANTEE	PC	DRIVING THE MARKET FOR MORE ENVIRONMENTALLY RESPONSIBLE PAPER	40,000
<b>Total . . . . .</b>  <b>3a</b>				2,483,771

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)				
<b>a</b> <i>Paid during the year</i>				
FRESH NEW LONDON 89 SOUTH STREET BOSTON,MA 02111	GRANTEE	PC	GENERAL SUPPORT	25,000
FUNDERS NETWORK FOR SMART GROWTH 1500 SAN REMO AVE CORAL GABLES,FL 33146	GRANTEE	PC	MEMBERSHIP GRANT	5,000
GARDENING THE COMMUNITY 250 ALBANY ST SPRINGFIELD,MA 01105	GRANTEE	PC	GENERAL SUPPORT	25,000
GEORGETOWN CLIMATE INSTITUTE 444 N CAPITOL STREET WASHINGTON,DC 20001	GRANTEE	PC	STATE ENERGY ANALYSIS TOOL	25,000
GREATER NEWARK CONSERVANCY 32 PRINCE STREET NEWARK,NJ 07103	GRANTEE	PC	URBAN FARMING & FOOD ACCESS INITIATIVE	30,000
GREEN AMERICA 1612 K STREET NW SUITE 600 WASHINGTON,DC 20006	GRANTEE	PC	BETTER PAPER PROJECT	30,000
GREEN GUERILLAS 232 E 11TH STREET NEWYORK,NY 10003	GRANTEE	PC	HIGH SCHOOL FOR PUBLIC SERVICE YOUTH FARM	30,000
GREEN PRESS INITIATIVE 68 MORNINGSIDE DRIVE ASHEVILLE,NC 28806	GRANTEE	PC	GENERAL SUPPORT	30,000
GROUNDWORK LAWRENCE 60 ISLAND STREET LAWRENCE,MA 01840	GRANTEE	PC	GREEN TEAM	25,000
HARTFORD FOOD SYSTEM INC 86 PARK STREET HARTFORD,CT 06106	GRANTEE	PC	GROW HARTFORD	25,000
LAND TRUST ALLIANCE 1660 L ST NW STE 1100 WASHINGTON,DC 20036	GRANTEE	PC	ADVANCING THE EXCELLENCE OF SOUTHEAST LAND TRUSTS - GENERAL SUPPORT	35,000
LOWCOUNTRY OPEN LAND TRUST 80 ALEXANDER STREET CHARLESTOWN,SC 29403	GRANTEE	PC	GENERAL SUPPORT MATCHING GRANT	10,000
MAKE THE ROAD NEWYORK 301 GROVE STREET BROOKLYN,NY 11237	GRANTEE	PC	NEIGHBORHOOD ROOTS INITIATIVE	25,000
MASSACHUSETTS AVENUE PROJECT 271 GRANT STREET BUFFALO,NY 14213	GRANTEE	PC	GROWING GREEN	30,000
MATTAPAN FOOD AND FITNESS COALITION 1613 BLUE HILL AVE SUITE 303 MATTAPAN,MA 02126	GRANTEE	PC	GENERAL SUPPORT	10,000
<b>Total . . . . .</b>  <b>3a</b>				2,483,771


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)				
<b>a</b> <i>Paid during the year</i>				
MOUNTAIN ASSOCIATION FOR COMMUNITY ECONOMIC DEVELOPMENT 433 CHESTNUT STREET BEREA, KY 40403	GRANTEE	PC	CLEAN ENERGY IN APPALACHIAN KENTUCKY	50,000
NATIONAL CAUCUS OF ENVIRONMENTAL LEGISLATORS 1301 PENNSYLVANIA AVENUE NW SUITE 800 WASHINGTON, DC 20004	GRANTEE	PC	STATE-BASED DEFENSE OF CLEAN ENERGY STRATEGIES, RENEWABLE PORTFOLIO STANDARDS AND ENERGY EFFICIENCY	30,000
NATURAL RESOURCES DEFENSE COUNCIL 40 W 20TH STREET NEW YORK, NY 10011	GRANTEE	PC	DEFENDING THE CUMBERLAND PLATEAU	50,000
NORRIS SQUARE NEIGHBORHOOD PROJECT 2141 N HOWARD ST PHILADELPHIA, PA 19122	GRANTEE	PC	YOUTH LEADERSHIP AND URBAN GARDEN PROGRAM	20,000
NORTHEAST ENERGY EFFICIENCY PARTNERSHIPS (NEEP) 91 HARTWELL AVENUE LEXINGTON, MA 02421	GRANTEE	PC	GENERAL SUPPORT	100,000
NORTHEAST SUSTAINABLE AGRICULTURE WORKING GROUP PO BOX 334 IRVINGTON, NY 10533	GRANTEE	PC	MEMBERSHIP GRANT	2,500
NORTHEAST SUSTAINABLE AGRICULTURE WORKING GROUP PO BOX 334 IRVINGTON, NY 10533	GRANTEE	PC	NESAWG CONFERENCE	1,300
NORTHSTAR FUND 520 8TH AVE 2203 NEW YORK, NY 10018	GRANTEE	PC	COMMUNITY FOOD FUNDERS MEMBERSHIP GRANT	7,500
NUESTRAS RAICES 329 MAIN ST HOLYOKE, MA 01040	GRANTEE	PC	SIEMBRA SIEMPRE	28,000
ORGANIZATION FOR REFUGEE AND IMMIGRANT SUCCESS 521 MAPLE ST MANCHESTER, NH 03104	GRANTEE	PC	FARM AND FOOD LEADERS INTERNSHIP PROGRAM	20,000
PENNSYLVANIA HORTICULTURAL SOCIETY 100 N 20TH STREET PHILADELPHIA, PA 19103	GRANTEE	PC	STRAWBERRY MANSION GREEN RESOURCE CENTER	20,000
PRODUCT STEWARDSHIP INSTITUTE 29 STANHOPE STREET BOSTON, MA 02116	GRANTEE	PC	SOURCE REDUCTION OF PHONE BOOKS AND DIRECT MAIL	25,000
PUBLIC INTEREST LAW CENTER OF PHILADELPHIA PUBLIC INTEREST LAW CENTER OF PHILADELPHIA PHILADELPHIA, PA 19103	GRANTEE	PC	GARDEN JUSTICE LEGAL INITIATIVE (GJLI)	25,300
REGIONAL ENVIRONMENTAL COUNCIL INC PS BOX 255 WORCESTER, MA 01613	GRANTEE	PC	YOUTHGROW (YOUTH GROWING ORGANICS IN WORCESTER)	30,000
RESOURCES FOR THE FUTURE 1616 P STREET NW WASHINGTON, DC 20036	GRANTEE	PC	CONSIDERING A U S CARBON TAX CONTINUATION OF A CRITICAL RFF RESEARCH INITIATIVE	50,000
<b>Total . . . . .</b>  <b>3a</b>				2,483,771

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)				
<b>a</b> <i>Paid during the year</i>				
SOUTHEAST ENERGY EFFICIENCY ALLIANCE 50 HURT PLAZA ATLANTA,GA 30303	GRANTEE	PC	SEEA PUBLIC SERVICE COMMISSIONS (PSCS) ENGAGEMENT SUPPORT	25,000
SOUTHERN ALLIANCE FOR CLEAN ENERGY PO BOX 1842 KNOXVILLE,TN 37901	GRANTEE	PC	PROMOTING ENERGY EFFICIENCY IN THE SOUTHEAST	150,000
SOUTHERN ENVIRONMENTAL LAW CENTER 201 WEST MAIN STREET SUITE 14 CHARLOTTESVILLE,VA 22902	GRANTEE	PC	PROMOTING ENERGY EFFICIENCY AS THE FIRST ENERGY RESOURCE OF THE SOUTHEAST	150,000
SOUTHWINGS 35 HAYWOOD ST ASHEVILLE,NC 28801	GRANTEE	PC	SOUTHERN APPALACHIAN CONSERVATION PROGRAM	15,000
ST MARY'S NUTRITION CENTER PO BOX 7291 LEWISTON,ME 04097	GRANTEE	PC	TELLING OUR STORIES RAISING UP YOUTH VOICES IN FOOD JUSTICE	27,000
SUSTAINABLE AGRICULTURE AND FOOD SYSTEM 16 W MISSION ST SANTA BARBARA,CA 93101	GRANTEE	PC	MEMBERSHIP GRANT	5,000
THE FOOD PROJECT 10 LEWIS STREET LINCOLN,MA 01773	GRANTEE	PC	YOUTH CULTIVATING URBAN COMMUNITIES THROUGH SUSTAINABLE AGRICULTURE	27,000
THE JORDAN INSTITUTE INC 17 DEPOT ST CONCORD,NH 033014904	GRANTEE	PC	SCALING UP TRANSFORMING BUILDING ENERGY USAGE IN NH'S C&I SECTOR	50,000
THE LAND TRUST FOR TENNESSEE 209 10TH AVENUE SOUTH - SUITE 511 NASHVILLE,TN 37203	GRANTEE	PC	SOUTH CUMBERLAND PROJECT	35,000
THE NEW SCHOOL TISHMAN ENVIRONMENT AND DESIGN CENTER 66 WEST 12TH STREET NEWYORK,NY 10011	GRANTEE	PC	FIVE BOROUGH FARM RESEARCH ASSISTANTS	2,500
THE POINT COMMUNITY DEVELOPMENT CORPORATION 940 GARRISON AVENUE BRONX,NY 10474	GRANTEE	PC	SOUTH BRONX FOOD JUSTICE & URBAN AGRICULTURE PROJECT	15,000
THE SUSTAINABILITY FUNDERS PO BOX 9346 BERKELY,CA 94709	GRANTEE	PC	GENERAL SUPPORT	7,500
THE VILLAGE OF ARTS AND HUMANITIES 2544 GERMANTOWN AVE PHILADELPHIA,PA 19133	GRANTEE	PC	PHILLYEARTH CENTER FOR ENVIRONMENTAL EDUCATION	25,000
THE WILDERNESS SOCIETY 1615 M STREET NW WASHINGTON,DC 20036	GRANTEE	PC	PROTECTING WILDLANDS WITHIN ANCIENT CULTURAL LANDSCAPES IN THE SOUTHERN APPALACHIANS	60,000
TIDES FOUNDATION PO BOX 29198 SAN FRANCISCO,CA 94129	GRANTEE	PC	CANOPY'S FROM POLICIES TO PRACTICE SECURING FOREST PROTECTION WITH MARKET LEVERAGE	60,000
<b>Total . . . . .</b>  <b>3a</b>				2,483,771

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)				
<b>a</b> <i>Paid during the year</i>				
UNITED COMMUNITY CENTERS 613 NEW LOTS AVENUE BROOKLYN, NY 11207	GRANTEE	PC	EAST NEW YORK FARMS <sup>1</sup>	30,000
UNITED TEEN EQUALITY CENTER 34 HURD STREET LOWELL, MA 01852	GRANTEE	PC	ENGAGING PROVEN-RISK YOUTH IN URBAN FARMING & HEALTHY FOODS ACCESS	15,000
URBAN FARMING INSTITUTE 29 DUNREATH STREET 3 ROXBURY, MA 02119	GRANTEE	PC	GENERAL SUPPORT	500
URBAN TREE CONNECTION 5125 WOODBINE AVENUE PHILADELPHIA, PA 191312404	GRANTEE	PC	NEIGHBORHOOD FOODS YOUTH LEADERSHIP PROGRAM	22,500
US CLIMATE ACTION NETWORK 1810 16TH STREET WASHINGTON, DC 20009	GRANTEE	PC	SOUTHEAST CLIMATE & ENERGY NETWORK (SCEN)	25,000
VISIONS INC 48 JUNIPER STREET ROXBURY, MA 02119	GRANTEE	PC	SUPPORT INSTITUTE & FOLLOWUP CONSULTING	4,300
VISIONS INC 48 JUNIPER STREET ROXBURY, MA 02119	GRANTEE	PC	SUPPORT INSTITUTE & FOLLOWUP CONSULTING	3,500
<b>Total . . . . .</b>  <b>3a</b>				2,483,771

<div>Schedule B</div> <div>(Form 990, 990-EZ, or 990-PF)</div> <div>Department of the Treasury Internal Revenue Service</div>	<div>Schedule of Contributors</div> <div>▶ Attach to Form 990, 990-EZ, or 990-PF.</div> <div>▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at <a href="http://www.irs.gov/form990">www.irs.gov/form990</a>.</div>	<div>OMB No 1545-0047</div>
		<div>2013</div>
<div>Name of the organization</div> <div>MERCK FAMILY FUND</div>		<div>Employer identification number</div> <div>22-6063382</div>

Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	<div><input type="checkbox"/> 501(c)( ) (enter number) organization</div> <div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust <b>not</b> treated as a private foundation</div> <div><input type="checkbox"/> 527 political organization</div>
Form 990-PF	<div><input checked="" type="checkbox"/> 501(c)(3) exempt private foundation</div> <div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation</div> <div><input type="checkbox"/> 501(c)(3) taxable private foundation</div>

Check if your organization is covered by the **General Rule** or a **Special Rule**.  
**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33<sup>1</sup>/<sub>3</sub>% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions of \$5,000 or more during the year. . . . . ▶ \$ \_\_\_\_\_

**Caution.** An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer “No” on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

<b>Name of organization</b> MERCK FAMILY FUND	<b>Employer identification number</b> 22-6063382
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Part I	Contributors (see instructions) Use duplicate copies of Part I if additional space is needed		
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
<u>1</u>	WIL MERCK 95 ELIOT STREET SUITE 2  MILTON, MA 02186	\$ 5,000	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions )
<u>2</u>	NAT CHAMBERLIN 95 ELIOT STREET SUITE 2  MILTON, MA 02186	\$ 9,971	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/>  (Complete Part II for noncash contributions )
<u>  </u>		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions )
<u>  </u>		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions )
<u>  </u>		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions )
<u>  </u>		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions )
<u>  </u>		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions )

[illegible]



<b>Name of organization</b> MERCK FAMILY FUND	<b>Employer identification number</b> 22-6063382
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Part III

**Exclusively** religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry

For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc , contributions of **\$1,000 or less** for the year (Enter this information once See instructions ) ▶ \$

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
<div></div> <div></div>		<div></div> <div></div> <div></div>	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
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(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
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	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
<div></div> <div></div>		<div></div> <div></div> <div></div>	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
<div></div> <div></div>		<div></div> <div></div> <div></div>	

## TY 2013 Accounting Fees Schedule

**Name:** MERCK FAMILY FUND

**EIN:** 22-6063382

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING SERVICES	15,450	0	0	15,450

**TY 2013 Investments Corporate  
Bonds Schedule**

**Name:** MERCK FAMILY FUND  
**EIN:** 22-6063382

Name of Bond	End of Year Book Value	End of Year Fair Market Value
CORPORATE BONDS	6,552,388	6,552,388

**TY 2013 Investments Corporate  
Stock Schedule****Name:** MERCK FAMILY FUND**EIN:** 22-6063382

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CORPORATE STOCK	36,123,581	36,123,581

# **TY 2013 Investments Government Obligations Schedule**

**Name:** MERCK FAMILY FUND

**EIN:** 22-6063382

**US Government Securities - End of  
Year Book Value:**

2,096,246

**US Government Securities - End of  
Year Fair Market Value:**

2,096,246

**State & Local Government  
Securities - End of Year Book  
Value:**

0

**State & Local Government  
Securities - End of Year Fair  
Market Value:**

0

TY 2013 Investments - Other Schedule

**Name:** MERCK FAMILY FUND

**EIN:** 22-6063382

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
LIMITED PARTNERSHIPS	FMV	13,184,030	13,184,030

**TY 2013 Land, Etc. Schedule****Name:** MERCK FAMILY FUND**EIN:** 22-6063382

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
COMPUTERS AND SOFTWARE	6,796	2,386	4,410	4,410
FURNITURE AND EQUIPMENT	335	335	0	
LEASEHOLD IMPROVEMENT	17,138	17,138	0	

**TY 2013 Other Assets Schedule****Name:** MERCK FAMILY FUND**EIN:** 22-6063382

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
INTEREST AND DIVIDENDS RECEIVABLE	108,475	114,407	114,407
PREPAID EXCISE TAXES	36,465	15,633	15,633
PROGRAM RELATED INVESTMENT	40,000	40,000	40,000
INVESTMENT LOAN RECEIVABLE		42,181	42,181



TY 2013 Other Decreases Schedule

**Name:** MERCK FAMILY FUND

**EIN:** 22-6063382

Description	Amount
PRIOR PERIOD ADJUSTMENT	101,953

**TY 2013 Other Expenses Schedule****Name:** MERCK FAMILY FUND**EIN:** 22-6063382

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MISCELLANEOUS EXPENSES	8,377	0	0	8,377
TEMPORARY HELP AND CONSULTANTS	107,708	0	0	107,708
TELEPHONE EXPENSE	2,667	0	0	2,667
OFFICE SUPPLIES	7,120	0	0	7,120
WORKER/PROPERTY/LIABILITY INSURANCE	2,529	0	0	2,529

TY 2013 Other Increases Schedule

**Name:** MERCK FAMILY FUND

**EIN:** 22-6063382

Description	Amount
NET UNREALIZED GAIN	9,375,520

**TY 2013 Other Liabilities Schedule**

**Name:** MERCK FAMILY FUND

**EIN:** 22-6063382

Description	Beginning of Year - Book Value	End of Year - Book Value
DEFERRED EXCISE TAX	125,300	312,400

**TY 2013 Other Professional Fees Schedule****Name:** MERCK FAMILY FUND**EIN:** 22-6063382

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT ADVISORY FEES	63,750	63,750	0	0
CUSTODY FEES	32,430	32,430	0	0
INVESTMENT MANAGEMENT FEES	361,318	511,368	0	0

**TY 2013 Taxes Schedule****Name:** MERCK FAMILY FUND**EIN:** 22-6063382

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES PAID	37,587	0	0	0
PAYROLL TAXES	18,253	899	0	17,354
FEDERAL EXCISE AND DEFERRED TAXES	233,932	0	0	0

**TY 2013 IRS Payment****Name:** MERCK FAMILY FUND**EIN:** 22-6063382**Routing Transit Number:** 021000089**Bank Account Number:** 59164501**Type of Account:** Checking**Payment Amount in Dollars and** 10,083**Cents:****Requested Payment Date:** 2014-10-28**Taxpayer's Daytime Phone** (617) 696-3580**Number:**