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Return of Private Foundation

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

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning

JUL 1, 2013

, and ending

JUN 30, 2014

► Do not enter Social Security numbers on this form as it may be made public.
► Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

Name of foundation

Pattony Foundation

Number and street (or P O box number if mail is not delivered to street address)

Choate LLP PO Box 961019

A Employer identification number

04-3577440

City or town, state or province, country, and ZIP or foreign postal code

Boston, MA 02196

Room/suite

B Telephone number

(617) 248-4760

C If exemption application is pending, check here ► D 1. Foreign organizations, check here ► 2. Foreign organizations meeting the 85% test, check here and attach computation ► E If private foundation status was terminated under section 507(b)(1)(A), check here ► F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ► G Check all that apply: Initial return Initial return of a former public charity
 Final return Amended return
 Address change Name changeH Check type of organization: Section 501(c)(3) exempt private foundation Section 4947(a)(1) nonexempt charitable trust Other taxable private foundationI Fair market value of all assets at end of year J Accounting method: Cash Accrual

(from Part II, col. (c), line 16)

K \$ 5,667,312. (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))

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received	300,005.		N/A	
2	Check ► <input type="checkbox"/> if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments	14.	14.	14.	Statement 1
4	Dividends and interest from securities	106,048.	106,048.	106,048.	Statement 2
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	334,135.			
b	Gross sales price for all assets on line 6a	2,437,753.			
7	Capital gain net income (from Part IV, line 2)		334,135.	334,135.	
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less Cost of goods sold				
c	Gross profit or (loss)				
11	Other income				
12	Total. Add lines 1 through 11	740,202.	440,197.	440,197.	
13	Compensation of officers, directors, trustees, etc	0.	0.	0.	0.
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees Stmt 3	7,811.	0.	7,811.	
b	Accounting fees Stmt 4	6,400.	3,200.	3,200.	
c	Other professional fees Stmt 5	55,106.	41,329.	41,329.	13,777.
17	Interest				
18	Taxes Stmt 6	8,400.	0.	0.	0.
19	Depreciation and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses Stmt 7	125.	0.	125.	
24	Total operating and administrative expenses. Add lines 13 through 23	77,842.	44,529.	44,529.	24,913.
25	Contributions, gifts, grants paid	0.			0.
26	Total expenses and disbursements. Add lines 24 and 25	77,842.	44,529.	44,529.	24,913.
27	Subtract line 26 from line 12:				
b	Excess of revenue over expenses and disbursements	662,360.			
c	Net investment income (if negative, enter -0-)		395,668.	395,668.	
	c Adjusted net income (if negative, enter -0-)			N/A	

323501 10-10-13 Excess of revenue over expenses and disbursements

LHA For Paperwork Reduction Act Notice, see instructions.

Form 990-PF (2013)

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only			
1	Cash - non-interest-bearing		1.	1.
2	Savings and temporary cash investments	263,606.	181,802.	181,802.
3	Accounts receivable ►			
	Less: allowance for doubtful accounts ►			
4	Pledges receivable ►			
	Less: allowance for doubtful accounts ►			
5	Grants receivable			
6	Receivables due from officers, directors, trustees, and other disqualified persons			
7	Other notes and loans receivable ► 824,930.	Statement 10		
	Less: allowance for doubtful accounts ► 0.	670,279.	824,930.	824,930.
8	Inventories for sale or use			
9	Prepaid expenses and deferred charges			
10a	Investments - U.S. and state government obligations			
b	Investments - corporate stock Stmt 11	3,057,779.	4,105,820.	4,105,820.
c	Investments - corporate bonds Stmt 12	75,948.	185,910.	185,910.
11	Investments - land, buildings, and equipment basis ►			
	Less accumulated depreciation ►			
12	Investments - mortgage loans			
13	Investments - other Stmt 13	0.	368,849.	368,849.
14	Land, buildings, and equipment basis ►			
	Less accumulated depreciation ►			
15	Other assets (describe ►)			
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)	4,067,612.	5,667,312.	5,667,312.
Liabilities				
17	Accounts payable and accrued expenses			
18	Grants payable			
19	Deferred revenue			
20	Loans from officers, directors, trustees, and other disqualified persons			
21	Mortgages and other notes payable			
22	Other liabilities (describe ►)			
23	Total liabilities (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ► <input 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	4,008,765.	5,668,716.	
28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
29	Retained earnings, accumulated income, endowment, or other funds	58,847.	<1,404.	>
30	Total net assets or fund balances	4,067,612.	5,667,312.	
31	Total liabilities and net assets/fund balances	4,067,612.	5,667,312.	

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	4,067,612.
2	Enter amount from Part I, line 27a	2	662,360.
3	Other increases not included in line 2 (itemize) ►	3	1,103,092.
4	Add lines 1, 2, and 3	4	5,833,064.
5	Decreases not included in line 2 (itemize) ►	5	165,752.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	5,667,312.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)			(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a 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 2,437,753.		2,103,618.		334,135.	
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
(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			
a				334,135.	
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	334,135.	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8			3	N/A	

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

 Yes No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2012	178,204.	3,694,911.	.048230
2011	144,241.	3,149,496.	.045798
2010	168,277.	2,953,085.	.056983
2009	124,747.	2,394,361.	.052100
2008	85,551.	1,786,387.	.047891

2 Total of line 1, column (d)

2 .251002

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 .050200

4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5

4 4,282,817.

5 Multiply line 4 by line 3

5 214,997.

6 Enter 1% of net investment income (1% of Part I, line 27b)

6 3,957.

7 Add lines 5 and 6

7 218,954.

8 Enter qualifying distributions from Part XII, line 4

8 215,567.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

Part VII Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)1a Exempt operating foundations described in section 4940(d)(2), check here ► 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 ► and enter 1% of Part I, line 27b

c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).

2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

3 Add lines 1 and 2

4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-

6 Credits/Payments:

a 2013 estimated tax payments and 2012 overpayment credited to 2013

b Exempt foreign organizations - tax withheld at source

c Tax paid with application for extension of time to file (Form 8868)

d Backup withholding erroneously withheld

6a 6,408.

6b

6c

6d

7 Total credits and payments. Add lines 6a through 6d

7 6,408.

8 Enter any penalty for underpayment of estimated tax. Check here 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 1,505.

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 ►

Refunded ►

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?

Yes

No

b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)?

If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities

c Did the foundation file Form 1120-POL for this year?

d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:

(1) On the foundation. ► \$ 0. (2) On foundation managers. ► \$ 0.

e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ 0.

2 Has the foundation engaged in any activities that have not previously been reported to the IRS?

*If "Yes," attach a detailed description of the activities.*3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*

4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

b If "Yes," has it filed a tax return on Form 990-T for this year?

N/A

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?

If "Yes," attach the statement required by General Instruction T

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?

7 Did the foundation have at least \$5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV*

8a Enter the states to which the foundation reports or with which it is registered (see instructions) ►

MA

b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? *If "Yes," complete Part XIV*10 Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*

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Part VII-A Statements Regarding Activities (continued)

11		X
12		X
13	X	
Website address ► N/A		
14	The books are in care of ► Choate Hall & Stewart LLP Located at ► Two International Place, Boston, MA	Telephone no. ► (617) 248-4760 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 N/A
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	Yes X No X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		
1a	During the year did the foundation (either directly or indirectly):	Yes No
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ►	1b X
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):	
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
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 N/A
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►	
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
b	If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013)	3b N/A
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b X

Part VII-B: Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a During the year did the foundation pay or incur any amount to:

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?
- (3) Provide a grant to an individual for travel, study, or other similar purposes?
- (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)?
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

 Yes No Yes No Yes No Yes No Yes No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

Organizations relying on a current notice regarding disaster assistance check here ► 5b X

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A

 Yes No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

 Yes No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If "Yes" to 6b, file Form 8870.

6b X

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

 Yes No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b **Part VIII: Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Patricia A. Rubbicco Choate Hall & Stewart LLP Two Int'l Boston, MA 02110	Trustee 1.00	0.	0.	0.
Anthony F. Rubbicco Choate Hall & Stewart LLP Two Int'l Boston, MA 02110	Trustee 1.00	0.	0.	0.
William A. Lowell Choate Hall & Stewart LLP Two Int'l Boston, MA 02110	Trustee 1.00	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

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

► 0

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Part VIII | **Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**
3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
Choate Hall & Stewart LLP Two Int'l Place, Boston, MA 02110	Invst Mgmt, Legal, Tax Prep	69,317.
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	
2		
3		
4		

Part IX-B | Summary of Program-Related Investments

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

Amount

1		
2	See Statement 14	190,654.
3	All other program-related investments. See instructions.	
Total. Add lines 1 through 3	►	190,654.

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:

- a Average monthly fair market value of securities
- b Average of monthly cash balances
- c Fair market value of all other assets
- d Total (add lines 1a, b, and c)

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

3 Subtract line 2 from line 1d

4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)

5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4

6 Minimum investment return. Enter 5% of line 5

1a	4,231,715.
1b	116,323.
1c	
1d	4,348,038.
2	0.
3	4,348,038.
4	65,221.
5	4,282,817.
6	214,141.

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

2a Tax on investment income for 2013 from Part VI, line 5

b Income tax for 2013. (This does not include the tax from Part VI.)

c Add lines 2a and 2b

3 Distributable amount before adjustments. Subtract line 2c from line 1

4 Recoveries of amounts treated as qualifying distributions

5 Add lines 3 and 4

6 Deduction from distributable amount (see instructions)

7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1

1	214,141.
2a	7,913.
2b	
2c	7,913.
3	206,228.
4	0.
5	206,228.
6	0.
7	206,228.

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

b Program-related investments - total from Part IX-B

2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes

3 Amounts set aside for specific charitable projects that satisfy the:

a Suitability test (prior IRS approval required)

b Cash distribution test (attach the required schedule)

4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4

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

6 Adjusted qualifying distributions. Subtract line 5 from line 4

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.

1a	24,913.
1b	190,654.
2	
3a	
3b	
4	215,567.
5	0.
6	215,567.

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				206,228.
2 Undistributed income, if any, as of the end of 2013			0.	
a Enter amount for 2012 only				
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2013:				
a From 2008				
b From 2009	5,673.			
c From 2010	23,911.			
d From 2011				
e From 2012				
f Total of lines 3a through e		29,584.		
4 Qualifying distributions for 2013 from Part XII, line 4: ► \$ 215,567.				
a Applied to 2012, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)				
c Treated as distributions out of corpus (Election required - see instructions)		0.		
d Applied to 2013 distributable amount				206,228.
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a))		9,339.		
6 Enter the net total of each column as indicated below:		0.		0.
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b			0.	
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount - see instructions			0.	
e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instr.				
1 Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)		0.		
8 Excess distributions carryover from 2008 not applied on line 5 or line 7		0.		
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a		38,923.		
10 Analysis of line 9:				
a Excess from 2009	5,673.			
b Excess from 2010	23,911.			
c Excess from 2011				
d Excess from 2012				
e Excess from 2013	9,339.			

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)				
<i>a Paid during the year</i>				
None				
Total				► 3a 0.
<i>b Approved for future payment</i>				
None				
Total				► 3b 0.

323611
10-10-13

Form 990-PF (2013)

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514	(e) Related or exempt function income	
		(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue:						
a						
b						
c						
d						
e						
f						
g Fees and contracts from government agencies						
2 Membership dues and assessments						
3 Interest on savings and temporary cash investments				14	14.	
4 Dividends and interest from securities				14	106,048.	
5 Net rental income or (loss) from real estate:						
a Debt-financed property						
b Not debt-financed property						
6 Net rental income or (loss) from personal property						
7 Other investment income						
8 Gain or (loss) from sales of assets other than inventory				18	334,135.	
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue:						
a						
b						
c						
d						
e						
12 Subtotal. Add columns (b), (d), and (e)			0.		440,197.	0.
13 Total. Add line 12, columns (b), (d), and (e)					13	440,197.
(See worksheet in line 13 instructions to verify calculations.)						

Relationship of Activities to the Accomplishment of Exempt Purposes

Schedule B

(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

- ▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
- ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990 -

OMB No 1545-0047

2013

Name of the organization

Employer identification number

Pattony Foundation

04-3577440

Organization type (check one):

Fillers of: _____ **Section:** _____

Form 990 or 990-EZ

- 501(c)() (enter number) organization
- 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- 527 political organization
- 501(c)(3) exempt private foundation
- 4947(a)(1) nonexempt charitable trust treated as a private foundation
- 501(c)(3) taxable private foundation

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 1/3% 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 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 to 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 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2013)

Name of organization

Employer identification number

Pattony Foundation

04-3577440

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
1	Anthony F. & Patricia A. Rubbicco Choate Hall & Stewart LLP Two Int'l Place Boston, MA 02110	\$ 113,112.	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input checked="" type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
2	Anthony F. & Patricia A. Rubbicco Choate Hall & Stewart LLP Two Int'l Place Boston, MA 02110	\$ 186,893.	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input checked="" type="checkbox"/> Noncash (Complete Part II for noncash contributions)
		\$ _____	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions)
		\$ _____	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions)
		\$ _____	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions)
		\$ _____	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions)
		\$ _____	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions)

Name of organization

Employer identification number

Pattony Foundation

04-3577440

Part II Noncash Property (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	T Rowe Price Real Estate Fund - 5,256.16 units	\$ 110,939.	01/28/14
2	SPDR S&P Midcap 400 ETF - 785 units	\$ 186,893.	01/28/14
	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	(b) Description of noncash property given	\$	
	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	(b) Description of noncash property given	\$	
	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	(b) Description of noncash property given	\$	

323453 10-24-13

Schedule B (Form 990, 990-EZ, or 990-PF) (2013)

Name of organization

Employer identification number

Pattony Foundation

Part II

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) ► \$ _____

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

Form 990-PF Interest on Savings and Temporary Cash Investments Statement 1

Source	(a) Revenue Per Books	(b) Net Investment Income	(c) Adjusted Net Income
Blackrock Federal Trust Fund	14.	14.	
Total to Part I, line 3	14.	14.	

Form 990-PF Dividends and Interest from Securities Statement 2

Source	Gross Amount	Capital Gains Dividends	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income
Dividends and Interest	106,048.	0.	106,048.	106,048.	
To Part I, line 4	106,048.	0.	106,048.	106,048.	

Form 990-PF Legal Fees Statement 3

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Choate Hall & Stewart LLP - Legal Fees RE scholarship Loan Program	7,811.	0.		7,811.
To Fm 990-PF, Pg 1, ln 16a	7,811.	0.		7,811.

Form 990-PF

Accounting Fees

Statement 4

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Choate Hall & Stewart LLP - Tax Preparation Fee	6,400.	3,200.		3,200.
To Form 990-PF, Pg 1, ln 16b	6,400.	3,200.		3,200.

Form 990-PF

Other Professional Fees

Statement 5

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Choate Hall & Stewart LLP - Investment Management, Custody, Recordkeeping	55,106.	41,329.		13,777.
To Form 990-PF, Pg 1, ln 16c	55,106.	41,329.		13,777.

Form 990-PF

Taxes

Statement 6

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Excise Tax	8,400.	0.		0.
To Form 990-PF, Pg 1, ln 18	8,400.	0.		0.

Form 990-PF

Other Expenses

Statement 7

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Filing Fee for MA Form PC	125.	0.		125.
To Form 990-PF, Pg 1, ln 23	125.	0.		125.

Form 990-PF

Other Increases in Net Assets or Fund Balances

Statement 8

Description	Amount
Book Value Adjustment from Cost to FMV	1,103,092.
Total to Form 990-PF, Part III, line 3	1,103,092.

Form 990-PF

Other Decreases in Net Assets or Fund Balances

Statement 9

Description	Amount
6/30/13 Dividends and Interest Posted 7/1/13	4,486.
Excess of Market Value Over Cost of Donated Securities	155,920.
Scholarship Loans Forgiven	5,346.
Total to Form 990-PF, Part III, line 5	165,752.

Form 990-PF

Other Notes and Loans Receivable

Statement 10

Description	Balance Due	Doubtful Acct	
		Allowance	FMV of Loan
various scholarship loans	824,930.	0.	824,930.
Total to Fm 990-PF, Part II, ln 7	824,930.	0.	824,930.

Form 990-PF	Corporate Stock	Statement 11
-------------	-----------------	--------------

Description	Book Value	Fair Market Value
Corporate Stock- Statement 16	4,105,820.	4,105,820.
Total to Form 990-PF, Part II, line 10b	4,105,820.	4,105,820.

Form 990-PF	Corporate Bonds	Statement 12
-------------	-----------------	--------------

Description	Book Value	Fair Market Value
Corporate Bonds- Statement 16	185,910.	185,910.
Total to Form 990-PF, Part II, line 10c	185,910.	185,910.

Form 990-PF	Other Investments	Statement 13
-------------	-------------------	--------------

Description	Valuation Method	Book Value	Fair Market Value
Other Investments- Statement 16	FMV	368,849.	368,849.
Total to Form 990-PF, Part II, line 13		368,849.	368,849.

Form 990-PF	Summary of Program-Related Investments	Statement 14
-------------	--	--------------

Description	Amount
Scholarship Loans (Non-Interest Bearing) To Individuals - Paid Directly To Educational Institutions.	
Current Year Scholarship Loans: \$196,000	
Prior Year Loans Forgiven: \$<5,346>	
	\$190,654
To Form 990-PF, Part IX-B, line 1	190,654.

Pattony Foundation

04-3577440

Form 990-PF

Part XV - Line 1a
List of Foundation Managers

Statement 15

Name of Manager

Patricia A. Rubbicco
Anthony F. Rubbicco

15191111 793251 14377-895

24
2013.04030 Pattony Foundation

Statement(s) 15
14377-S1

Asset Detail**Statement of Value and Activity**

June 1, 2014 - June 30, 2014

Asset Detail

Description	Shares/Quantity	Market Value	Unrealized G/L	Accrued Income	Cost Basis	% of Account
Cash & Equivalents						
BlackRock Liquidity Funds Federal Trust Fund Portfolio	181,801.74	\$181,801.74	\$0.00	\$1.23	\$181,801.74	3.75%
TICKER TFFXX						
 Total Cash & Equivalents		\$181,801.74	\$0.00	\$1.23	\$181,801.74	3.75%
 <i>Fixed Income</i>						
Other Taxable						
Federated Total Return Bond Fund	4,872.84	\$54,283.47	\$633.47	\$163.50	\$53,650.00	1.12%
TICKER FTRBX						
Metropolitan West Total Return Bond Fund	4,980.81	\$53,991.93	\$796.93	\$111.25	\$53,195.00	1.11%
TICKER MVTRX						
PIMCO Total Return Exchange-Traded Fund	500.00	\$54,500.00	\$1,104.35	\$0.00	\$53,395.65	1.13%
TICKER BOND						
		\$162,775.40	\$2,534.75	\$274.75	\$160,240.65	3.36%
 <i>Other International</i>						
Vanguard Total International Bond ETF	450.00	\$23,134.50	\$338.49	\$0.00	\$22,796.01	0.48%
TICKER BNDX						
		\$23,134.50	\$338.49	\$0.00	\$22,796.01	0.48%
 Total Fixed Income		\$185,909.90	\$2,873.24	\$274.75	\$183,036.66	3.84%

Asset Detail (continued)**Statement of Value and Activity**

June 1, 2014 - June 30, 2014

Description	Shares/Quantity	Market Value	Unrealized GL	Accrued Income	Cost Basis	% of Account
<i>Equity</i>						
U.S. Large Capitalization						
iShares Core S&P 500 ETF	1,406.00	\$276,982.00	\$46,385.46	\$0.00	\$230,596.54	5.72%
TICKER: IVV						
Powershares Buyback Achievers Portfolio	3,680.00	\$165,048.00	\$52,547.73	\$0.00	\$112,500.27	3.41%
TICKER: PKW						
Vanguard Dividend Appreciation Index Fund	970.00	\$75,611.50	\$27,665.40	\$0.00	\$47,946.10	1.56%
TICKER: VIG						
Vanguard 500 Index Fund	6,473.23	\$966,906.37	\$559,417.38	\$0.00	\$407,488.99	19.94%
TICKER: VIFSX						
		\$1,484,547.87	\$686,015.97	\$0.00	\$798,531.90	30.63%
<i>International Emerging</i>						
Causeway Emerging Markets Fund	9,761.69	\$123,387.77	\$13,117.77	\$0.00	\$110,270.00	2.55%
TICKER: CEMIX						
Lazard Emerging Markets Equity Inst	6,196.42	\$126,283.08	\$43,270.18	\$0.00	\$83,012.90	2.61%
TICKER: L2EMX						
Vanguard FTSE Emerging Markets ETF	5,815.00	\$250,800.95	\$24,612.01	\$0.00	\$226,188.94	5.18%
TICKER: VWO						
Wisdomtree Emerging Mkts Small Cap Dividend Fund	1,395.00	\$66,932.10	\$2,440.65	\$0.00	\$64,491.45	1.38%
TICKER: DGS						
		\$567,403.90	\$83,440.61	\$0.00	\$483,963.29	11.72%
<i>International Developed</i>						
Artisan International Value Fund	6,913.71	\$270,533.55	\$23,398.55	\$0.00	\$247,135.00	5.59%
TICKER: ARTKX						

Asset Detail (continued)**Statement of Value and Activity**

June 1, 2014 - June 30, 2014

Description	Shares/Quantity	Market Value	Unrealized G/L	Accrued Income	Cost Basis	% of Account
iShares TR MSCI EAFE Growth ETF TICKER EFG	3,220.00	\$233,289.00	\$42,798.99	\$3,485.65	\$190,490.01	4.82%
MFS International Value Fund TICKER MINIX	6,694.13	\$248,686.86	\$57,150.86	\$0.00	\$191,536.00	5.14%
Vanguard FTSE Developed Markets ETF TICKER VEA	13,980.00	\$595,408.20	\$101,535.60	\$0.00	\$493,872.60	12.30%
<i>International Small Cap</i>						
MFS International New Discovery Fund TICKER MWNIX	3,338.66	\$102,229.86	\$17,327.66	\$0.00	\$84,902.20	2.11%
Templeton Institutional Foreign Smaller Company Fund TICKER TFSCX	4,363.21	\$101,139.12	\$17,976.42	\$0.00	\$83,162.70	2.09%
<i>Unclassified</i>						
iShares MSCI USA Min Vol ETF TICKER USMV	6,145.00	\$228,716.90	\$8,910.86	\$1,161.20	\$219,806.04	4.72%
Powershares S&P Emerging Markets Low Volatility Portfolio TICKER EELV	2,490.00	\$70,093.50	\$881.71	\$0.00	\$69,211.79	1.45%

Asset Detail (continued)

Statement of Value and Activity

June 1, 2014 - June 30, 2014

Description	Shares/Quantity	Market Value	Unrealized G/L	Accrued Income	Cost Basis	% of Account
Powershares S&P International Developed Low Volatility Portfolio TICKER: IDLV	6,090.00	\$203,771.40	\$10,602.08	\$0.00	\$193,169.32	4.21%
		\$502,581.80	\$20,394.65	\$1,161.20	\$482,187.15	10.38%
Total Equity		\$4,105,820.16	\$1,050,039.31	\$4,646.85	\$3,055,780.85	84.78%
Alternative Commodities Credit Suisse Commodity Return Strategy TICKER: CRSOX	4,475.04	\$34,457.83	\$2,537.98	\$0.00	\$31,919.85	0.71%
Emerging Market Bonds Goldman Sachs Local Emerging Markets Debt Fund TICKER: GIMDX	4,750.43	\$41,043.72	-\$2,846.45	\$201.53	\$43,890.17	0.85%
MFS Emerging Markets Debt Fund TICKER: MEDIX	2,671.23	\$40,949.91	\$10,604.77	\$157.73	\$30,345.14	0.85%
Frontier Markets Morgan Stanley Ins Fr Emrg-I TICKER: MFMIX	5,943.90	\$122,325.42	\$19,555.42	\$0.00	\$102,770.00	2.53%

Asset Detail (continued)***Statement of Value and Activity***

June 1, 2014 - June 30, 2014

<u>Description</u>	<u>Shares/Quantity</u>	<u>Market Value</u>	<u>Unrealized GL</u>	<u>Accrued Income</u>	<u>Cost Basis</u>	<u>% of Account</u>
Templeton Frontier Markets Fund	6,827.92	\$130,071.80	\$20,327.41	\$0.00	\$109,744.39	2.69%
TICKER FFRZX						
	\$252,397.22	\$39,882.83		\$0.00	\$212,514.39	5.22%
Total Alternative		\$368,848.68	\$50,179.13	\$359.26	\$318,669.55	7.63%
Total All Assets	\$4,842,380.48	\$1,103,091.68	\$5,282.09	\$3,739,288.80	100.00%	

THE PATTONY FOUNDATION

Educational Loan Application for School Year 2014-2015

The Pattony Foundation provides interest-free loans to help students finance their education. Loans range in amounts from \$1,000 to \$10,000. The Foundation makes interest-free loans rather than outright grants because it believes that it is important for students to invest in their own education.

Selection Criteria

In order to qualify as an applicant, you must meet the following criteria:

- Have graduated or be about to graduate from a high school or college located in New England (i.e., the states of Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, or Vermont).
- Be enrolled or enrolling in an accredited post-secondary institution.
- Demonstrate, in order of most to least important, the following: financial need; character, motivation and leadership skills; and academic promise.
- Complete and submit this application with the required attachments, prior to the deadline listed below.

In order to receive the interest-free loan, if selected:

- Dependent students: you and your parents will be required to sign a promissory note agreeing to repay the loan (without interest).
- Independent students: you will be required to sign a promissory note agreeing to repay the loan (without interest).

All loans shall be paid back in equal monthly payments over a five year term. The first payment will be due on the first day of the month following the six-month anniversary of your graduation. Payments are principal only and no interest will be due unless the loan is in default.

* Applicants who have qualified and received interest-free loan(s) from the Foundation in prior year(s) may be eligible to apply for additional loans in succeeding year(s) *

Deadline

Your completed application and attachments must arrive in one envelope at the address listed below no later than May 31, 2014. Applicants selected to receive a loan will be notified on or about July 31, 2014.

Mail three (3) copies of the completed application together with three (3) copies of the required attachments in one envelope to:

The Pattony Foundation
c/o William A. Lowell
Choate, Hall & Stewart LLP
Two International Place
Boston, Massachusetts 02110

Please contact Maggie Wilson at (617) 248-4700 if you have any questions concerning the application or submission process.

THE PATTONY FOUNDATION EDUCATIONAL LOAN APPLICATION

The student applying for the loan must complete this application legibly in black or blue ink. Every section must be completed. If a section does not apply to you write an explanation or "N/A". This application will be considered incomplete if a section is left blank.

A. Background Information

Name: _____

Social Security No.: _____

Birth Date: _____

Permanent Address: _____

Telephone: _____

E-mail: _____

Please provide the address and phone number for the best place to contact you, if different from above:

Address: _____

Telephone: _____

High School

Graduated: Yes/No (circle one)

If yes, date of graduation: _____ If no, expected date of graduation: _____

Name, City and State of High School: _____

Post-Secondary Institution, that you currently attend or have attended in the past, if applicable.

Graduated: Yes/No (circle one)

If yes, date of graduation: _____ If no, expected date of graduation: _____

Name, City and State of Institution: _____

Post-Secondary or Graduate Institution, for this loan request.

Name, City and State of Institution: _____

Loan Amount Requested: \$ _____, Not to exceed \$10,000.

(This section MUST be completed. The Foundation reserves the right to award less than the requested amount.)

Enrollment Status:

In Fall 2014,

I am: Accepted/Enrolled/Awaiting a Decision (*circle one*)
*If applicable, attach copy of Acceptance Letter*I will be a: Freshman/Sophomore/Junior/Senior/Graduate Student (*circle one*)
Full-time/Part-time (*circle one*)

My expected graduation date is: _____

My intended field of study and degree are: _____

My housing status is: On Campus/Off Campus/Home with Family (*circle one*)**Character Reference Letter: (Required for first time applicants)**

Attach a reference letter from someone who will know your address after graduation. (Personal friends, neighbors, employers, clergy, etc.)

** Immediate family and persons from the academic field may not be used **

B. Financial Aid Information**(1) Financial Aid:**If you have NOT applied for financial aid, check this box If you HAVE applied for financial aid, please attach the following documents:

- Copy of the financial aid award letter from the college or institution of higher education you will be attending (if you are undecided, please send award letters from your top two choices)
- Copy of your final Student Aid Report (SAR);
"Information Acknowledgement 2014-2015 Student Aid Report Federal Student Aid Programs"

(2) Budget (*Attach Official School Brochure or Letter Showing Costs of Tuition, Room & Board, Etc*)Budget for Academic Year

Tuition/Fees	\$ _____
Room/Board	\$ _____
Books	\$ _____
Travel	\$ _____
Other	\$ _____
Total	\$ _____

Your Resources for Academic Year

Given by Family	\$ _____
Your Own Resources	\$ _____
Wages (if any)	\$ _____
Scholarships (if any)	\$ _____
Other Loans (if any)	\$ _____
Total	\$ _____

(3) Educational Indebtedness:

Total student loans owed to date - please list sources, interest rate and repayment terms. Include any previous loans from this Foundation. Estimate your total debt upon completion of your studies/graduation.

(4) Financial Resources – Dependent Student:*Parental Information:*

Complete this question using information from the most recent U.S. Income Tax Return.
(A completed Form 4506-T – Request for Transcript of Tax Return must also be included)

Father - Name and Occupation: _____

Mother - Name and Occupation: _____

Adjusted Gross Income: \$ _____ (Amount from Father \$ _____)
(Amount from Mother\$ _____)

Number of Family Members _____ Number of Dependents _____

List all family members supported at least half-time by parents, not including student applicant.

Name/age	School/tuition	Relationship to Applicant

(5) Financial Resources - Independent Student:

Complete this question about you and your spouse (if applicable) using information from your most recent U.S. Income Tax Return.

(A completed Form 4506-T – Request for Transcript of Tax Return must also be included)

Adjusted Gross Income: \$ _____ (Amount from Student \$ _____)
(Amount from Spouse \$ _____)

List all family members that you support at least half-time, not including yourself.

Name/age	School/tuition	Relationship to Applicant
Name/age	School/tuition	Relationship to Applicant
Name/age	School/tuition	Relationship to Applicant

(6) Special Circumstances

- Do you have any unusual personal, financial, or family circumstances that warrant special attention? Please be specific.

C. Leadership And Personal Qualities

(1) Resume/Activities: Please attach a resume or list of activities that you participate in including positions held, dates of participation, estimated time spent on each activity and any special honors received.

(2) Essay:
If you are going to be a college freshman in the fall AND you are a first-time applicant – Submit an essay describing your educational goals, why you selected a particular college, efforts you have made to finance your education, and general information about yourself.
If you are not a first-time applicant OR you are already enrolled in college or graduate school OR you will be attending graduate school in the fall – Submit an essay of no more than 500 words on one of the following topics:

- *Tell us about a class you have taken or a teacher that has influenced the career path or future goals.*
- *Explain why a college education is important to you.*

(3) Letter of Recommendation: (Required for first time applicants)
Submit a letter of recommendation that addresses your leadership skills and potential. You may submit the letter directly or have the person writing the recommendation send it directly to the Pattony Foundation.

D. Academic Information

(1) Submit an official copy of your most recent transcript; high school, college, or graduate school.

E. Additional Information

(1) Will you be the first person in your family to pursue a post-secondary education?
 Yes No

(2) How did you hear about the interest-free loans from the Pattony Foundation?

F. CERTIFICATION AND SIGNATURES

I (we) certify that the information on this form is true and complete to the best of my (our) knowledge. I (we) shall provide on request any information required to verify statements made in this application. I (we) realize that if I (we) do not comply with requests for information, eligibility for loans will be lost. I (we) further agree that, if the Pattony Foundation selects me to receive an interest-free loan, I (we) will execute a promissory note to repay the loan.

Signature of Applicant

Date

Signature of Applicant's Mother, if applicant is a dependent

Date

Signature of Applicant's Father, if applicant is a dependent

Date

Mail three (3) copies of the completed application together with three (3) copies of the required attachments in one envelope to:

The Pattony Foundation
c/o William A. Lowell
Choate, Hall & Stewart LLP
Two International Place
Boston, Massachusetts 02110

Your envelope must arrive no later than May 31, 2014

*Please do not staple the application or attachments, and include your name
on all materials submitted*

THE PATTONY FOUNDATION
CHECK LIST OF REQUIREMENTS FOR SUBMITTING
STUDENT LOAN APPLICATION

This check list is intended only as a "check list" and has been included to assist in keeping track of the application requirements which need to be completed.

- 1. **Application filled in completely**
 - Background Information** (Section A)
 - Financial Aid Information** (Section B)
 - Leadership and Personal Qualities** (Section C)
 - Academic Information** (Section D)
 - Additional Information** (Section E)
 - Certification and Signatures** (Section F)
- 2. **Acceptance Letter** (Section A) *
- 3. **Character Reference** (Section A) *
- 4. **Financial Award Letter and/or SAR** (Section B1)
- 5. **School Literature** (Section B2) *
- 6. **Form 4506-T – Request for Transcript of Tax Return** (Section B4 or B5)
- 7. **Resume of Activities** (Section C1)
- 8. **Essay** (Section C2)
- 9. **Scholastic Reference Letter:** (Section C3) *
- 10. **Official Transcript** (Section D1)

Loans are made to the **student applicant only** (not the parents, the school or outside agencies).

It is important that you follow these instructions carefully - your ability to follow these instructions is a factor taken into consideration by the Foundation Trustees when selecting loan recipients.

The application form **MUST BE FILLED IN COMPLETELY** by the student applying for the loan with all the requested information. If a particular question or section is not applicable to you, indicate either "Not Applicable", "No" or "None".

Recipients must notify the Foundation if any of the following changes have occurred:
change of graduation date; change of school; change of major; change of address or change of telephone number.

(*) Students who have previously received funds from the Foundation DO NOT need to complete these sections