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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.

Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

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

Name of foundation
THE JULIA & SEYMOUR GROSS FOUNDATION, INC.

Number and street (or P.O. box number if mail is not delivered to street address) Room/suite
P.O. BOX 506

City or town, state or province, country, and ZIP or foreign postal code
WESTON, MA 02493-0003

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name change

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col (c), line 16) **\$ 6,264,904.** (Part I, column (d) must be on cash basis)

J Accounting method: ☒ Cash ☐ Accrual
☐ Other (specify) _____

A Employer identification number
13-6122092

B Telephone number
781-237-2544

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 ☐

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				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		226.	226.		STATEMENT 1
4 Dividends and interest from securities		113,189.	113,189.		STATEMENT 2
5 Gross rents					
6 Net rental income or (loss)					
7 Net gain or (loss) from sale of assets not on line 10		168,585.			
8 Gross sales price for all assets on line 6a		917,237.			
9 Capital gain net income (from Part IV, line 2)			168,585.		
10 Net short-term capital gain					
11 Income modifications					
12a Gross sales less returns and allowances					
12b Cost of goods sold					
12c Gross profit or (loss)					
13 Other income					
14 Total. Add lines 1 through 11		282,000.	282,000.		
15 Compensation of officers, directors, trustees, etc		43,500.	13,050.		30,450.
16 Other employee salaries and wages					
17 Pension plans, employee benefits					
18 Legal fees					
19 Accounting fees STMT 3		12,024.	0.		12,024.
20 Other professional fees STMT 4		30,091.	30,091.		0.
21 Interest					
22 Taxes STMT 5		12,333.	135.		0.
23 Depreciation and depletion					
24 Occupancy					
25 Travel, conferences, and meetings					
26 Printing and publications					
27 Other expenses STMT 6		3,552.	0.		3,552.
28 Total operating and administrative expenses. Add lines 13 through 23		101,500.	43,276.		46,026.
29 Contributions, gifts, grants paid		381,103.			381,103.
30 Total expenses and disbursements. Add lines 24 and 25		482,603.	43,276.		427,129.
31 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<200,603.>			
b Net investment income (if negative, enter -0-)			238,724.		
c Adjusted net income (if negative, enter -0-)				N/A	

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10-10-13

LHA For Paperwork Reduction Act Notice, see instructions.

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing				
	2	Savings and temporary cash investments		1,543,323.	1,783,442.	1,783,442.
	3	Accounts receivable ▶				
		Less: allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U.S. and state government obligations STMT 7	39,545.	31,611.	34,876.	
	b	Investments - corporate stock STMT 8	3,267,277.	2,834,489.	4,446,586.	
	c	Investments - corporate bonds				
	11	Investments - land, buildings, and equipment basis ▶				
	Less: accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other					
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)		4,850,145.	4,649,542.	6,264,904.	
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 checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31					
	24	Unrestricted		4,850,145.	4,649,542.	
	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		4,850,145.	4,649,542.		
31	Total liabilities and net assets/fund balances		4,850,145.	4,649,542.		

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	4,850,145.
2	Enter amount from Part I, line 27a	2	<200,603.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	4,649,542.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	4,649,542.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a SEE ATTACHMENT A	P	VARIOUS	VARIOUS
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 917,237.		748,652.	168,585.
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			168,585.
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	168,585.
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	303,314.	5,610,606.	.054061
2011	408,953.	5,350,827.	.076428
2010	227,552.	5,249,652.	.043346
2009	207,639.	4,862,913.	.042698
2008	386,698.	5,894,382.	.065605

2 Total of line 1, column (d)	2	.282138
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	.056428
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	6,083,491.
5 Multiply line 4 by line 3	5	343,279.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,387.
7 Add lines 5 and 6	7	345,666.
8 Enter qualifying distributions from Part XII, line 4	8	427,129.

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 VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	2,387.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	2,387.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	2,387.
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a 10,000.		
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	10,000.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	7,613.	
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax 7,613. Refunded	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XIV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <u>NY</u>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

Part VII-A

Statements Regarding Activities (continued)

11

At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)

11

X

12

Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)

12

X

13

Did the foundation comply with the public inspection requirements for its annual returns and exemption application?

13

X

Website address

N/A

14

The books are in care of

JANE ROGERS CLARK, MD

Telephone no.

781-237-2544

Located at

P.O. BOX 506, WESTON, MA

ZIP+4

02493-0003

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?

16

Yes

No

X

See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

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?

Yes

X

No

(2)

Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?

Yes

X

No

(3)

Furnish goods, services, or facilities to (or accept them from) a disqualified person?

X

Yes

No

(4)

Pay compensation to, or pay or reimburse the expenses of, a disqualified person?

X

Yes

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)?

Yes

X

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.)

Yes

X

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)?

1b

X

Organizations relying on a current notice regarding disaster assistance check here

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?

Yes

X

No

If "Yes," list the years

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.)

N/A

2b

c

If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.

3a

Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?

Yes

X

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)

N/A

3b

4a

Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?

4a

X

b

Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?

4b

X

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☒ Yes ☐ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

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

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?

SEE STATEMENT 10

☒ 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
SEE STATEMENT 9		43,500.	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
NONE		

Total number of others receiving over \$50,000 for professional services 0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 N/A	
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 N/A	
2	
All other program-related investments See 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	4,253,273.
b	Average of monthly cash balances	1b	1,922,860.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	6,176,133.
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	6,176,133.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	92,642.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	6,083,491.
6	Minimum investment return Enter 5% of line 5	6	304,175.

Part XI**Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	304,175.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	2,387.
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2,387.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	301,788.
4	Recoveries of amounts treated as qualifying distributions	4	500.
5	Add lines 3 and 4	5	302,288.
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	302,288.

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	427,129.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	427,129.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	2,387.
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	424,742.

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				302,288.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2013:				
a From 2008	82,696.			
b From 2009				
c From 2010				
d From 2011	144,832.			
e From 2012	30,268.			
f Total of lines 3a through e	257,796.			
4 Qualifying distributions for 2013 from Part XII, line 4: ► \$	427,129.			
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				302,288.
e Remaining amount distributed out of corpus	124,841.			
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	382,637.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				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	82,696.			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	299,941.			
10 Analysis of line 9:				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011	144,832.			
d Excess from 2012	30,268.			
e Excess from 2013	124,841.			

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) **N/A**

1 a 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 foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

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

Part XV Supplementary Information (Complete this part only if the foundation 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).)

NONE

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.

NONE

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:

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

c Any submission deadlines:

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

Part XV

Supplementary Information (continued)

3

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

<div> <div>Recipient</div> <div>Name and address (home or business)</div> </div>	<div> If recipient is an individual, show any relationship to any foundation manager or substantial contributor </div>	<div> Foundation status of recipient </div>	<div> Purpose of grant or contribution </div>	<div> Amount </div>
<div>a</div> <div>Paid during the year</div>				
SEE ATTACHMENT C				381,603.
Total			▶ 3a	381,603.
<div>b</div> <div>Approved for future payment</div>				
NONE				
Total			▶ 3b	0.

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

		Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		
a	Transfers from the reporting foundation to a noncharitable exempt organization of:		
	(1) Cash		X
	(2) Other assets		X
b	Other transactions:		
	(1) Sales of assets to a noncharitable exempt organization		X
	(2) Purchases of assets from a noncharitable exempt organization		X
	(3) Rental of facilities, equipment, or other assets		X
	(4) Reimbursement arrangements		X
	(5) Loans or loan guarantees		X
	(6) Performance of services or membership or fundraising solicitations		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees		X
d	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.		

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

☐ Yes ☒ No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

**Sign
Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Signature of officer or trustee

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

THOMAS F. BLANEY,
CPA, CFE

Preparer's signature

OK AS

Date _____

268/15

Check ☐ self-employed

PTIN	
------	--

P00234022

Firm's name ▶ O'CONNOR DAVIES, LLP

Firm's EIN ► 27-1728945

Firm's address ► 665 FIFTH AVENUE
NEW YORK, NY 10022

Phone no. (212) 286-2600

Form **990-PF** (2013)

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
INTEREST INCOME - CHECKING	41.	41.	
INTEREST INCOME - MONEY MARKET FUND	185.	185.	
TOTAL TO PART I, LINE 3	226.	226.	

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 FROM SECURITIES	113,189.	0.	113,189.	113,189.	
TO PART I, LINE 4	113,189.	0.	113,189.	113,189.	

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
O'CONNOR DAVIES, LLP	12,024.	0.		12,024.
TO FORM 990-PF, PG 1, LN 16B	12,024.	0.		12,024.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
INVESTMENT ADVISORY FEES	30,091.	30,091.			0.
TO FORM 990-PF, PG 1, LN 16C	30,091.	30,091.			0.

FORM 990-PF	TAXES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
EXCISE TAX	12,198.	0.			0.
FOREIGN TAXES	135.	135.			0.
TO FORM 990-PF, PG 1, LN 18	12,333.	135.			0.

FORM 990-PF	OTHER EXPENSES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
DUES AND SUBSCRIPTIONS	750.	0.			750.
INSURANCE	2,200.	0.			2,200.
OFFICE EXPENSES	352.	0.			352.
FILING FEES	250.	0.			250.
TO FORM 990-PF, PG 1, LN 23	3,552.	0.			3,552.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	7
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHMENT B		X	31,611.	34,876.
TOTAL U.S. GOVERNMENT OBLIGATIONS				
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			31,611.	34,876.
TOTAL TO FORM 990-PF, PART II, LINE 10A			31,611.	34,876.

FORM 990-PF	CORPORATE STOCK	STATEMENT	8
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHMENT B	2,834,489.	4,446,586.
TOTAL TO FORM 990-PF, PART II, LINE 10B		4,446,586.

FORM 990-PF

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

STATEMENT 9

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
JONATHAN P. GERTLER, MD P.O. BOX 506 WESTON, MA 02493-0003	SECRETARY 5.00	0.	0.	0.
JANE R. CLARK, MD P.O. BOX 506 WESTON, MA 02493-0003	PRESIDENT/EXECUTIVE DIRECT 21.00	43,500.	0.	0.
CLARK CHESSIN GERTLER P.O. BOX 506 WESTON, MA 02493-0003	VICE PRESIDENT 1.00	0.	0.	0.
CHARLES GARRISON GERTLER P.O. BOX 506 WESTON, MA 02493-0003	TREASURER 1.00	0.	0.	0.
ROGER D. KAMM, PHD P.O. BOX 506 WESTON, MA 02493-0003	BOARD MEMBER 0.50	0.	0.	0.
WILLIAM R. GERTLER P.O. BOX 506 WESTON, MA 02493-0003	BOARD MEMBER 0.50	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		43,500.	0.	0.

FORM 990-PF

EXPENDITURE RESPONSIBILITY STATEMENT
PART VII-B, LINE 5C

STATEMENT 10

GRANTEE'S NAME

WESTON AFFORDABLE HOUSING FOUNDATION

GRANTEE'S ADDRESS

P.O. BOX 171
WESTON, MA 02493

GRANT AMOUNT	DATE OF GRANT	AMOUNT EXPENDED
1,000.	06/21/14	

PURPOSE OF GRANT

GENERAL

DATES OF REPORTS BY GRANTEE

PENDING

ANY DIVERSION BY GRANTEE

NONE

The Julia & Seymour Gross Foundation, Inc.
Realized Gain/Loss Schedule
July 1, 2013 through June 30, 2014

Security	Shares	Gross Proceeds	Cost Basis	Realized Gain/Loss
3M Company	1,000	\$ 115,847.98	\$ 73,692.00	\$ 42,155.98
Microsoft Corp CGMI and/or its affiliates	6,000	187,705.53	166,984.90	20,720.63
United Parcel Service CL B	2,000	177,420.91	146,284.00	31,136.91
Xerox	3,000	28,085.51	29,828.20	(1,742.69)
Cisco Systems, Inc.	3,000	61,168.93	59,525.00	1,643.93
Devon Energy Corp	1,000	59,209.96	64,982.70	(5,772.74)
Lockheed Martin Corp	500	69,301.64	46,673.95	22,627.69
PPG Industries, Inc.	400	69,790.80	27,336.00	42,454.80
Royal Dutch Shell	1,000	70,789.66	68,642.00	2,147.66
Qualcomm Inc.	1,000	77,916.17	64,703.00	13,213.17
Total		<u>\$ 917,237.09</u>	<u>\$ 748,651.75</u>	<u>\$ 168,585.34</u>

The Julia & Seymour Gross Foundation, Inc.
Portfolio Value
As of June 30, 2014

Security	Shares	Cost Basis	Market Value
Stock			
3M Company	1,500.00	\$ 121,568.22	\$ 214,860.00
Apple Inc	2,100.00	74,960.75	195,153.00
Berkshire Hathaway Inc. Cl. B	2,500.00	121,195.50	316,400.00
Chevron Corp.	2,000.00	169,463.00	261,100.00
Clearbridge Energy MLP FD Inc	5,000.00	119,539.00	149,250.00
Conocophillips	1,500.00	86,481.57	128,595.00
Du Pont El De Nemours & Co.	3,000.00	132,091.10	196,320.00
Exxon Mobil Corp	3,500.00	244,709.75	352,380.00
General Electric Co.	7,000.00	175,142.16	183,960.00
Great Plains	3,000.00	71,577.90	80,610.00
Google Inc. Class A, CGMI and/or its Affiliates	75.00	21,253.34	43,850.25
Google Inc. Class C, CGMI and/or its Affiliates	75.00	21,185.44	43,146.00
Intel Corp CGMI and/or its affiliates	3,000.00	69,107.80	92,700.00
International Paper Co.	2,000.00	62,933.60	100,940.00
Lockheed Martin Corp	500.00	46,673.95	80,365.00
Merck & Co Inc New Com	1,500.00	67,834.05	86,775.00
MetLife Incorporated	3,181.00	138,424.61	176,736.36
Metlife Inc. Common Equityt UTS SNY 5%	2,500.00	69,221.26	79,900.00
Microsoft Corp CGMI and/or its affiliates	4,000.00	105,401.40	166,800.00
National Grid PLC	1,000.00	43,209.00	74,380.00
Nestle S A Sponsored ADR	1,500.00	71,560.00	116,505.00
Nextera Energy Inc	1,500.00	84,878.40	153,720.00
Peoples United Fincl Inc	6,000.00	85,037.70	91,020.00
Phillips 66 (spinoff of Conocophillips)	1,500.00	79,258.53	120,645.00
PPG Industries Inc.	600.00	36,133.00	126,090.00
Procter & Gamble Co.	1,000.00	52,906.67	78,590.00
Schlumberger LTD	1,000.00	83,281.70	117,950.00
Southern Co.	1,000.00	35,452.90	45,380.00
Texas Instruments	1,500.00	46,258.05	71,685.00
Travelers Companies Inc.	1,000.00	49,249.62	94,070.00
UnitedHealth GP Inc.	1,500.00	107,446.00	122,625.00
Wal-Mart Stores Inc.	1,500.00	74,975.00	112,605.00
Walt Disney Co	2,000.00	66,078.00	171,480.00
		\$ 2,834,488.97	\$ 4,446,585.61
BONDS			
GNMA PL#003345M 5.0% Due 2/20/33		9,841.37	10,107.57
GNMA PL#003247M 5.0% Due 6/20/32		4,433.82	7,119.07
GNMA PL#003233M 5.5% Due 5/20/17		2,538.67	1,775.98
GNMA PL# 003259M 5.5% Due 7/20/32		5,116.17	6,139.48
GNMA PL#590122X 6% Due 5/15/32		2,494.28	4,798.83
GNMA PL#003249M 6% Due 6/20/32		4,426.08	3,597.69
GNMA PL#586596X 6.5% Due 6/15/32		2,760.97	1,337.45
		\$ 31,611.36	\$ 34,876.07
TOTAL INVESTMENTS		\$ 2,866,100.33	\$ 4,481,461.68

The Julia & Seymour Gross Foundation, Inc.**Grants Paid****As of June 30, 2014**

Grantee	Foundation Status	Purpose of Grant	Amount
McGill University 845 Sherbrooke Street West, Montreal, QC H3A2T5, Canada	PC	School of Music	21,286
Trustees of Boston University Development Office, 72 East Concord Street, 7th Fl., #703B Boston, MA 02118	PC	BUSM: Department of Otolaryngology	2,750
South Coast Artists, Inc PO Box N98 Westport, MA 02790	PC	General	1,000
Buzzards Bay Coalition, Inc. 114 Front Street New Bedford, MA 02740	PC	General	10,000
Trustees of Boston University Development Office, 72 East Concord Street, 7th Fl., #703B Boston, MA 02118	PC	BUSM: Department of Otolaryngology	10,000
Belmont Hill School 350 Prospect Street, Belmont, MA 02478	PC	General	2,500
Joslin Diabetes Center 1 Joslin Place, Boston, MA 02215	PC	General	7,367
Boston Youth Symphony Orchestras, Inc 855 Commonwealth Ave Boston, MA 02215	PC	General	15,000

The Julia & Seymour Gross Foundation, Inc.

Grants Paid

As of June 30, 2014

Grantee	Foundation Status	Purpose of Grant	Amount
Planned Parenthood League of Massachusetts 1055 Commonwealth Avenue Boston, MA 02215	PC	General	50,000
Weill Medical College of Cornell University 1300 York Avenue, New York, NY 10021	PC	Dr. David Hajjar Harvard Fellowship	25,000
Wesleyan University 318 High Street, Middletown, CT 06459	PC	Endowment Petricelli Center For Social Entrepreneurship	25,000
Radcliffe Institute for Advanced Study 10 Garden Street, Cambridge, MA 02138	PC	General	25,000
Community Rowing, Inc. Harry Parker Boathouse 20 Nonantum Road Brighton, MA 02135	PC	General	2,500
Massachusetts General Hospital Administrative Office 55 Fruit St., Bulfinch 130 Boston, MA 02114-2696	PC	Peter Gross Chair in Medicine at MGH	10,000
SquashBusters, Inc. 795 Columbus Avenue, Roxbury Crossing, MA 02120	PC	General	25,000
National Multiple Sclerosis Society 101A First Avenue, Suite 6 Waltham, MA 02451	PC	General	500

The Julia & Seymour Gross Foundation, Inc.
Grants Paid
As of June 30, 2014

Grantee	Foundation Status	Purpose of Grant	Amount
Cystic Fibrosis Foundation 6931 Arlington Road Bethesda, MD 20814	PC	General	750
Weill Medical College of Cornell University 1300 York Avenue, New York, NY 10021	PC	Dr. Kathy Hajjar Department	25,000
Museum of Science 1 Science Park Boston, MA 02114	PC	General	250
Pan Massachusetts Challenge Trust 77 4th Avenue Needham, MA 02494	PC	General	250
Massachusetts C.F.I.D.S Association, Inc. PO Box 690305 Quincy, MA 02269	PC	General	500
Free Chapel Association 36 Howland Road; PO Box 3749 Westport, MA 02790	PC	The Acoaxet Chapel	500
The African Leadership Bridge c/o Charles R. Reeder, Jr. 7713 Yaupon Drive Austin, TX 78759	PC	General	2,500
Children of Peace International 773 Johnson Ave Loveland, CO 80537	PC	General	4,800

The Julia & Seymour Gross Foundation, Inc.**Grants Paid****As of June 30, 2014**

Grantee	Foundation Status	Purpose of Grant	Amount
Columbia University PO Box 1383 New York, NY 10277	PC	P&S Alumni Giving Fund	1,000
Community Legal Services & Counseling Center 1 West Street, Cambridge, MA 02139	PC	General	5,000
Dartmouth College 1 Medical Center Dr Lebanon, NH 03756	PC	The Fund for Geisel School of Medicine at Dartmouth	1,000
Unitarian Universalist Association 35 Church Street Watertown, MA 02472	PC	The First Parish of Watertown	4,000
Free the Slaves 1320 19th Street NW, Suite 600 Washington, DC 20039	PC	General	5,000
Harvard College 124 Mount Auburn Street, Cambridge, MA 02138	PC	Parents Fund	5,000
Harvard College 124 Mount Auburn Street, Cambridge, MA 02138	PC	Class of 2008 - General	1,000
Harvard College 124 Mount Auburn Street, Cambridge, MA 02138	PC	Class of 2013 - General	1,000

The Julia & Seymour Gross Foundation, Inc.
Grants Paid
As of June 30, 2014

Grantee	Foundation Status	Purpose of Grant	Amount
Harvard College 10-12 Holyoke St. Cambridge, MA 02138	PC	Freshman Arts Program	2,000
Land's Sake, Inc. 27 Crescent Street, Weston, MA 02493	PC	General	1,000
Massachusetts Institute of Technology 600 Memorial Drive W98-200, Cambridge MA 02139	PC	Meredith Kamm Fund	4,800
Max Warburg Courage Curriculum, Inc 263 Huntington Avenue #366 Boston, MA 02115	PC	General	4,800
Weston Public Schools 444 Wellesley Street Weston, MA 02493	PC	Weston Metco Scholarship Fund	1,000
New Venture Fund 1201 Connecticut Ave. NW, Suite 300 WASHINGTON, DC 20036	PC	Organ Alliance	1,000
Our Sisters' School Inc. 145 Brownell Avenue New Bedford, MA 02740	PC	General	500
Friends of Resiliency for Life, Inc. 115 A Street, Framingham, MA 01701	PC	General	1,000

The Julia & Seymour Gross Foundation, Inc.
Grants Paid
As of June 30, 2014

Grantee	Foundation Status	Purpose of Grant	Amount
St Paul's School 325 Pleasant Street, Concord, NH 03301	PC	Advanced Studies Program	1,000
Signet Society 46 Dunster St Cambridge, MA 02138	PC	General	1,000
Squash Haven 70 Tower Parkway New Haven, CT 06520	PC	General	20,000
Stanford University Dept. 34478, PO Box 39000 San Francisco, CA 94139	PC	General	1,000
U.S. Squash 555 Eighth Avenue, Suite 1102, New York, NY 10018	PC	General	250
Home for Little Wanderers-Waltham House 271 Huntington Ave Boston, MA 02115	PC	Waltham House	4,800
Town of Weston 89 Welesley Street Weston, MA 02493	PC	WEEFC	1,000
Weston Affordable Housing Foundation, Inc PO Box 171 Weston, MA 02493	POF	General	1,000

The Julia & Seymour Gross Foundation, Inc.
Grants Paid
As of June 30, 2014

Grantee	Foundation Status	Purpose of Grant	Amount
Westport River Watershed Alliance 1151 Main Road, PO Box 3427, Westport, MA 02790	PC	General	2,500
Yale University PO Box 7611, New Haven, CT 06519	PC	School of Medicine: Yale Surgical Society	1,000
Yale University Department of Otolaryngology, 4th Floor 800 Howard Avenue New Haven, CT 06519	PC	Otolaryngology Residency Fund	500
Yale University 180 York Street New Haven, CT 06511	PC	School of Architecture: Educational Technology Fund	20,000
Klezmer Conservatory Foundation, Inc 7 Sidney Street, Watertown, MA 02472	PC	General	1,000
Trustees of Boston University Development Office, 72 East Concord Street, 7th Fl., #703B Boston, MA 02118	PC	BUSM: Strong & Vaughan Professorship	10,000
Trustees of Boston University Development Office, 72 East Concord Street, 7th Fl., #703B Boston, MA 02118	PC	BUSM: Otolaryngology Dean's account	10,000
Total Grants:			<u><u>381,603</u></u>

Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

► **File a separate application for each return.**

► **Information about Form 8868 and its instructions is at www.irs.gov/form8868**

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

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

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

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

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

Part I only ☐

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

Type or print	Name of exempt organization or other filer, see instructions.	Enter filer's identifying number
	THE JULIA & SEYMOUR GROSS FOUNDATION, INC.	Employer identification number (EIN) or 13-6122092
File by the due date for filing your return. See instructions.	Number, street, and room or suite no. If a P.O. box, see instructions.	Social security number (SSN)
	P.O. BOX 506	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	WESTON, MA 02493-0003	

Enter the Return code for the return that this application is for (file a separate application for each return)

0 4

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

JANE ROGERS CLARK, MD

- The books are in the care of ► P.O. BOX 506 - WESTON, MA 02493-0003
Telephone No. ► 781-237-2544 Fax No. ►

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box ☐ . If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **FEBRUARY 15, 2015**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
- ☐ calendar year _____ or
- ☒ tax year beginning **JUL 1, 2013**, and ending **JUN 30, 2014**.

- 2 If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	10,000.
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	10,000.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0.

Caution. If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

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

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

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

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

Enter filer's identifying number, see instructions	
Type or print Name of exempt organization or other filer, see instructions. THE JULIA & SEYMOUR GROSS FOUNDATION, INC.	Employer identification number (EIN) or 13-6122092
File by the due date for filing your return. See instructions. Number, street, and room or suite no. If a P.O. box, see instructions. P.O. BOX 506	Social security number (SSN)
City, town or post office, state, and ZIP code. For a foreign address, see instructions. WESTON, MA 02493-0003	

Enter the Return code for the return that this application is for (file a separate application for each return)

04

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

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

JANE ROGERS CLARK, MD

- The books are in the care of **P.O. BOX 506 - WESTON, MA 02493-0003**

Telephone No. **781-237-2544**

Fax No.

- If the organization does not have an office or place of business in the United States, check this box ☐

- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

- 4 I request an additional 3-month extension of time until **MAY 15, 2015**.
- 5 For calendar year , or other tax year beginning **JUL 1, 2013**, and ending **JUN 30, 2014**.
- 6 If the tax year entered in line 5 is for less than 12 months, check reason. ☐ Initial return ☐ Final return ☐ Change in accounting period

- 7 State in detail why you need the extension
ADDITIONAL TIME IS NEEDED TO COMPILE THE INFORMATION NECESSARY TO FILE A COMPLETE AND ACCURATE RETURN.

8a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	8a	\$	10,000.
8b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868	8b	\$	10,000.
8c Balance due. Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	8c	\$	0.

Signature and Verification must be completed for Part II only.

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

Signature **Jeanne Moran** Title **CPA** Date **2/10/15**

Form 8868 (Rev. 1-2014)