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Form **99Q-PF**

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.

Internal Revenue Service Information about F	orm 990-PF and its separate	instructions is at www.irs	.gov/form990pf.	Open to Public Inspection				
For calendar year 2013 or tax year beginning DE		, and ending	NOV 30, 2014					
Name of foundation ROBERT AND DANA SMITH CHA FOUNDATION C/O CASTANEA F			A Employer identification 22-3850789	number				
THREE NEWTON EXECUTIVE PA		304	B Telephone number (617)630-2	400				
City or town, state or province, country, and ZIP or foreign NEWTON, MA 02462			C If exemption application is pe					
G Check all that apply: Initial return	Initial return of a fo	ormer public charity	D 1. Foreign organizations	check here				
Final return	Amended return	ormor public charty						
Address change	Name change		Foreign organizations med check here and attach cor	eting the 85% test,				
	exempt private foundation		E If private foundation stat	us was terminated				
Section 4947(a)(1) nonexempt charitable trust	Other taxable private founda	ation	under section 507(b)(1)					
I Fair market value of all assets at end of year J Accou	nting method: X Cash	Accrual	F If the foundation is in a 6	60-month termination				
(from Part II, col. (c), line 16)	Other (specify)		under section 507(b)(1)	(B), check here				
▶\$ 7,117,328. (Part I, co	olumn (d) must be on cash i	basis)						
Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may no necessarily equal the amounts in column (a))		(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)				
1 Contributions, gifts, grants, etc., received	454,437.		N/A					
2 Check X if the foundation is not required to attach Sch B	FO 704	E0 704	ļ	CMAMENTA 1				
3 Interest on savings and temporary cash investments	50,794. 78,166.	50,794. 78,166.		STATEMENT 1 STATEMENT 2				
4 Dividends and interest from securities	70,100.	/0,100.		STATEMENT Z				
5a Gross rents								
b Net rental income or (loss)	715,683.							
b Gross sales price for all 3,034,394 assets on line 6								
b Gross sales price for all 3,034,394 assets on line 6a 3,034,394 a		715,683.	RECEIVED					
8 Net short-term capital gain				78				
9 Income modifications		α	2 0 2015					
Gross sales less returns and allowances		Ç	 JUN 1 ® 2015	11:4				
b Less Cost of goods sold				. , 5				
c Gross profit or (loss)			00000	<u> </u>				
11 Other income		l,						
12 Total. Add lines 1 through 11	1,299,080.	844,643.						
13 Compensation of officers, directors, trustees, etc	0.	0.		0.				
14 Other employee salaries and wages			<u> </u>					
15 Pension plans, employee benefits								
	7,800.	0.		7,800.				
c Other professional fees STMT 4	11,242.	11,242.		0.				
9 17 Interest		,						
b Accounting fees STMT 3 c Other professional fees STMT 4 fight 17 Interest 18 Taxes STMT 5 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings	21,145.	0.		0.				
19 Depreciation and depletion	-							
20 Occupancy								
22 Printing and publications								
23 Other expenses STMT 6	30.	0.		30.				
23 Other expenses STMT 6 24 Total operating and administrative expenses. Add lines 13 through 23	40.015	11 010						
expenses. Add lines 13 through 23	40,217.	11,242.	ļ	7,830.				
25 Contributions, girls, grants paid	277,280.			277,280.				
26 Total expenses and disbursements.	317,497.	11,242.		205 110				
Add lines 24 and 25	311,431.	11,442.	*	285,110.				
27 Subtract line 26 from line 12:	981,583.	1						
Excess of revenue over expenses and disbursements Net investment income (if negative, enter -0-)	301,303.	833,401.	<u> </u>	 				
c Adjusted net income (if negative, enter -0-)		†	N/A					
323501 10-10-13 LHA For Paperwork Reduction Act Notice,	see instructions.		la 14	Form 990-PF (2013)				

22-3850789

Page 2

		Balance Sheets Attached schedules and amounts in the description	Beginning of year	End of	
Pa	ırt l	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing	10,947.	53,637.	53,637.
	2	Savings and temporary cash investments	170,851.	224,910.	224,910.
1	3	Accounts receivable			
ı		Less; allowance for doubtful accounts			
1	4	Pledges receivable ►			
l		Less; allowance for doubtful accounts ▶			
- 1	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
		disqualified persons .			
	7	Other notes and loans receivable			
ŀ		Less: allowance for doubtful accounts			
2	8	Inventories for sale or use			
Assets	9	Prepaid expenses and deferred charges			
ا تخ	10a	Investments - U.S. and state government obligations			
}	b	Investments - corporate stock STMT 8	5,553,457.	6,418,697.	6,838,781.
ı	C	Investments - corporate bonds			
i	11	Investments - land, buildings, and equipment basis		·	
		Less accumulated depreciation			
1	12	Investments - mortgage loans			
	13	Investments - other .			
- 1	14	Land, buildings, and equipment: basis			
		Less accumulated depreciation			
		Other assets (describe)			
	16	Total assets (to be completed by all filers - see the			- 44- 000
		instructions. Also, see page 1, item 1)	5,735,255.	6,697,244.	7,117,328.
	17	• • •			
	18	Grants payable			
es	19	Deferred revenue .		****	
Ħ	20	Loans from officers, directors, trustees, and other disqualified persons			
Liabilities	21	Mortgages and other notes payable			
_	22	Other liabilities (describe)	<u> </u>	· · · · · · · · · · · · · · · · · · ·	
	۱,,	Total liabilities (add lines 17 through 22)	0.	0.	
_	23	Foundations that follow SFAS 117, check here			1
		and complete lines 24 through 26 and lines 30 and 31.			
es	24	Unrestricted			İ
secur		Temporarily restricted			1
3ak	i i	Permanently restricted			
둳	- "	Foundations that do not follow SFAS 117, check here			1
Ξ	1	and complete lines 27 through 31.			
þ	27	Capital stock, trust principal, or current funds	6,256,726.	6,697,244.	ļ.
ets	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	1
Ass	29	Retained earnings, accumulated income, endowment, or other funds	<521,471.	> 0.	1
Net Assets or Fund Bala	30	Total net assets or fund balances	5,735,255.	6,697,244.	1
~					
	31	Total liabilities and net assets/fund balances	5,735,255.	6,697,244.	
	art	III Analysis of Changes in Net Assets or Fund E	Balances		
1		If net assets or fund balances at beginning of year - Part II, column (a), line	: 30	1.	5,735,255.
_		st agree with end-of-year figure reported on prior year's return) er amount from Part I, line 27a		. 1	981,583.
_			•	3	961,363.
3		er increases not included in line 2 (itemize)	•	4	6,716,838.
4		reases not included in line 2 (itemize)	SEE ST	ATEMENT 7 5	19,594.
D A		al net assets or fund balances at end of year (line 4 minus line 5) - Part II, o		6	6,697,244.
<u> </u>	1010	in the account of talle commission at one of your failer i times into of Tall it, o	<u> </u>	1.	Form 990-PF (2013)

Form 990-PF (2013) FOUNDATION C/O CASTANEA PARTNERS

Part IV Capital Gains and Losses for Tax on Investment Income 22-3850789

(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.)					w acquired Purchase Donation	(c) Date a		(d) Date sold (mo., day, yr.)
18 GOLDMAN SACHS XX248-1					P	VARI		
b GOLDMAN SACHS				†···	P	VARI		
c GOLDMAN SACHS XX494-8				 	P	VARI		
d				-		******	005	
е				 				
(e) Gross sales price	(f) Depreciation allowed (or allowable)		t or other basis xpense of sale				ain or (loss) s (f) minus (
a 484,355.		<u> </u>	469,43	4.				14,921.
ь 2,236,695.		1	1,570,37					666,325.
c 313,344.			278,90	7.				34,437.
d				Ì				
е								
Complete only for assets show	ng gain in column (h) and owned by	y the foundation	on 12/31/69			(I) Gains (C	ol. (h) gaın	minus
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69		cess of col. (1) col. (j), if any		С	ol. (k), but r Losses	not less thai (from col. (
a								14,921.
b								666,325.
С								34,437.
đ								
е								
2 Capital gain net income or (net c	apital loss) { If gain, also ent If (loss), enter -	er in Part I, line 0- in Part I, line	7 7	}	2			715,683.
3 Net short-term capital gain or (lo if gain, also enter in Part I, line 8,	•	and (6):						
If (loss), enter -0- in Part I, line 8				J.	3		N/A	
Part V Qualification U	Inder Section 4940(e) fo	r Reduced	Tax on Net	Inve	stment Ir	come		
(For optional use by domestic privat	e foundations subject to the section	1 4940(a) tax on	net investment in	come.)	_			
If postupe 4040/d\/2\ contine leave t	his part blank							
If section 4940(d)(2) applies, leave t	ins part blank.							
Was the foundation liable for the sec	ction 4942 tax on the distributable a	mount of any ye	ar in the base per	riod?				Yes X No
If "Yes," the foundation does not qua					_			
	each column for each year; see the	instructions bet	fore making any e	ntries.				
(a) Base period years Calendar year (or tax year beginn	- · l		Net value of no				Dıstrıt (col. (b) dıv	oution ratio rided by col. (c))
2012		49,812.			033,26		•	.057981
2011		08,449.		5,	520,17	1.		.055877
2010		14,136.		6,	376,19	4.		.174734
2009	1,1	04,802.			933,51			.159342
2008		40,826.		6,	723,01	9.		.110192
2 Total of line 1, column (d)						2		.558126
3 Average distribution ratio for the the foundation has been in existe		I on line 2 by 5,	or by the number	of years	5	3		.111625
4 Enter the net value of noncharita	ble-use assets for 2013 from Part X	K, line 5				4	-	6,841,989.
5 Multiply line 4 by line 3						5		763,737.
6 Enter 1% of net investment inco	me / 1% of Part I line 27h)		-					8,334.
				•		6		
7 Add lines 5 and 6	- •			•		7		772,071.
	m Part XII, line 4 n line 7, check the box in Part VI, lir	ne 1b, and comp	lete that part usin	1g a 1%	tax rate.	8		285,110.
See the Part VI instructions.								

C	Did the foundation file Form 1120-POL for this year?	1c		Х
đ	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:			
	(1) On the foundation. \blacktriangleright \$ 0. (2) On foundation managers. \blacktriangleright \$ 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?	2		Х
	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		ŀ	
	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3	i	X
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on Form 990-T for this year? N/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		Х
	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:	1		
	By language in the governing instrument, or	İ		
	By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law		1	1
	remain in the governing instrument?	6	X	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	7	Х	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)	-		
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)	T	ĺ	
	of each state as required by General Instruction G? If "No," attach explanation	_ 8b	Х	
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	9		X
0	Did any persons become substantial contributors during the tax year? if "Yes," attach a schedule listing their names and addresses	10		X
		orm 990)-PF	(2013)

11 A any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section \$120/13/19/11/45, at above shedled (see instructions) 12 Did the foundation make a distribution to a donor advised fund over which the foundation or a designating depending on the foundation or a designating depending on the foundation comply with the public inspection requirements for its annual returns and exemption application? 13 Did the boundation comply with the public inspection requirements for its annual returns and exemption application? 14 The books are united of PROBERT MITTH 15 The books are united of PROBERT MITTH 16 The books are united of PROBERT MITTH 17 The books are united of PROBERT MITTH 18 Telephone no. (617) 630-2400 18 Section 494/2(9)) in ponesemption thereals treasewal or accrued during the year 19 And yit time diving cleandry are 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? 19 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. 19 Loung the year did the foundation of their directly or indirectly? 10 Engage in the sale or exchange, or leasing of property with a dequalited person? 11 Pays compensation to, or pay or remotives the openiess of a dequalited person? 12 First produce, survices, or featiles to (or accept them from) a disqualited person? 13 First play income or assets to a disqualited person (or make any of either analisbic for the benefit or use of a disqualited person)? 15 Transfer any income or assets to a disqualited person (or make any of either analisbic for the benefit or use of a disqualited person)? 15 Transfer any income or assets to a disqualited person (or make any of either analisbic for the benefit or use of a disqualited person)? 16 Transfer any income or assets to a disqualited person (or make any		art VII-A Statements Regarding Activities (continued)	703		aye J
section 572(b) (13)? If Yes, a stach schedule (see instructions) 2. Did the broundation make a distribution to a donor advessed find over which the foundation or a disqualified person had advisory privileges? 17 Yes, a stach statement (see instructions) 18 Did the foundation comply with be public inspection requirements for its annual returns and exemption application? Website address > N/A 19 The books are in care of > ROBERT SMITH Located at > 3 NEWTON EXECUTIVE PK, SUITE 30.4, NEWTON, MA 2014 The books are in care manufor it av-centry interest received or account during the year 18 A lary time during calendar year 2013, did the foundation have an interest in or a significance or other authority over a bank, securities, or other financial account in a foreign country? 20 Section 4947(a)(1) indexempt of the foundation have an interest in or a significance or other authority over a bank, securities, or other financial account in a foreign country? 21 Section 4947(a)(1) indexempt of the foundation have an interest in or a significance or other authority over a bank, securities, or other financial account in a foreign country? 22 Section 4947(a)(1) indexemption and interest in or a significance or other authority over a bank, securities, or other financial account in a foreign country? 23 Section 4947(a)(1) see securities of or with financial account in a foreign country? 24 Section when the sale or exceptions and filing requirements for form To F90-22.1. If Yes, enter the name of the foreign country. 25 Flore from the sale or exceptions and filing requirements for form To F90-22.1. If Yes, enter the name of the foreign country. 25 Tanget in the sale or exception or reduced the Yes of Curman, nurses an exception applies. 26 Section when the sale or exchange or leasing of inspective with a desqualitied person? 27 Section when the sale or exchange or leasing of inspective with a desqualitied person? 28 Flore from the sale or exchange or leasing or leasing of the sale of a disqualitied person? 29		, , , , , , , , , , , , , , , , , , , 	T		
12 Did the foundation makes a distribution to a donor advesed fund over which the foundation or a disqualified person had advisory privileges? 11 Yes, statist statement (see instructions) 12 N/A 13 N the loundation comply with the public inspection requirements for its annual returns and exemption application? 13 N the books are in care of ▶ ROBERT SMITH 14 To be loundation comply with the public inspection requirements for its annual returns and exemption application? 15 Section 4947(k) (1) inscerption facinity this stating from 190-PF in lieu of Farm 1041 - Chick here and enter the amount of tax-exempla interest received or accrued during the year 15 A ray time during clientary set 2013, dull the foundation have an interior in or a signature or other authority over a bank, securities, or other financial account in a foreign country? 16 A ray time during clientary set 2013, dull the foundation have an interior in or a signature or other authority over a bank, securities, or other financial account in a foreign country? 18 Earth 17 Statements Regarding Activities for Which Form 4720 May Be Required 19 File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 Unique the set of the foundation (either directly or indirectly)? 10 Engage in the sale or exchange, or lessing of property with a disqualified person? 11 Engage in the sale or exchange, or lessing of property with a disqualified person? 12 Engage in the sale or exchange, or lessing of property with a disqualified person? 13 Furneth goods, services, or facilities to (or accept them from) a disqualified person? 14 Pay compensation to, or systems, or facilities to (or accept them from) a disqualified person? 15 Engage and the expenses of a disqualified person? 16 Part Sill Part Sil	''		1,1		x
It Yes, attach sistement (see astructions) 13	12		<u> </u>		<u> </u>
13 Dd the foundation comply with the public inspection requirements for its annual returns and exemption application? Whesh teadress N / A 14 The books are in care of ROBERT SMITH Telephone no. 617) 630-2400 Located at 3 NEWTON EXECUTIVE PK, SUITE 304, NEWTON, MA 2P-4 02246 Section 4947(a)(1) innexional part of the security interest received or accrued during the year A lat y time during clained 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 fining requirements for form T0 F 90-22.1. If Yes,* enter the name of the foreign country? See the instructions for exceptions and fining requirements for form T0 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. File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. For any item is the sale or exclanate, or item is a column, unless an exception applies. For any item is a column is a column in the sale and the column is a column in the sale and the column is a column in the sale and the column is	'-		12		x
Webste address N N	13	·		х	
14 The books are in care of ROBERT SMITH Telephone no. (61.7) 630-2400					
Located at \$\insert 3\$ NEWTON EXECUTIVE PK, SUTTE 304, NEWTON, MA ZIP+4 \$\insert 02462 Section 4947(a)(1) nonexempt charitable trusts filing form 990-PF in leu of Form 1041-Check here and enter the amount of tax-exempt interest received or accrued during the year 18 At any time during cellendary year 2013, did the foundation have an interest in or a signature or other authority over a bank, so the instructions for exceptions and filing requirements for Form 10 F 90-22. It. If yes, enter the name of the foreign country? See the instructions for exceptions and filing requirements for Form 10 F 90-22. It. If yes, enter the name of the foreign country Part VII-B Statements Regarding Activities for Whitch 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? (2) Borrow money from, led money for, or otherwise extend credit for accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or remitivise the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay moriey or properly to a povernment official? (Exception, Check No- 1 full person in the service of the servic	14		630	-24	00
15 Section 4947(a)(1) nonexempti charable trusts fling Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year 10 form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year 10 form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year 2013, and the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a 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. 1 a During the year did the foundation (either divectly or indirectly)? (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person, a disqualified person, and a disqualified person, a disqualified person, a disqualified person, and the services, or facilities to (or accept it from) a disqualified person, a disqualified person, a disqualified person, a disqualified person, and the services, or facilities to (or accept it from) a disqualified person, a disqualified person, and the services, or facilities to (or accept it from) a disqualified person, a disqualified person, and the services of					
and enter the amount of tax-exempl interest received or accrued during the year A lary 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?	15				
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 Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any tem is checked in the "Yes" column, unless an exception applies. Ves No		•	N	/A	
See the instructions for exceptions and filling requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country	16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank,		Yes	No
Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 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 a from) a disqualified person? Yes X No 3 Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No 4 Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes X No 5 Transfer ary income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the mention of government service, if terminating within 90 days.) 1b 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.) 1c If any answer is "Set to 1a(1)-(6), did any of the acts fat to quality under the exceptions described in Regulations seatons of section 4942(a) (10) or 4942(a) (10) or 4942(a) (10) or 4942(a) (10) or 4942(a) (10) or 4942(a) (10) or 4942(a) (10) or 4942(a) (10) or 4942(a) (10) or 4942(a) (10) or 4942		securities, or other financial account in a foreign country?	16		X
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 18 During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lean dimoney to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception, Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) b) If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(g)-3 or in a current notice regarding disaster assistance (see instructions)? 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? 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(g)(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 \infty or 4942(g)(5): a) At the end of tax year 2013, did the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the years undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement -see instructions). b) If "Yes," is the years \infty or bequest; or (3) the lapse of		See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign			
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 lessing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government officiar? (Exception, Check 'No' if the foundation argeed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) b) If any answer is "Yes" to 1(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53-491 (1)-3 or in a current notice regarding disaster assistance (see instructions)? C) Did the foundation engage in a prior year in any of the acts described either 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(3) or 4942(1)(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," Sit the years > b Are there any years itsed 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) all years listed, answer 'No' and attach in the foundation factor which the foundation is an applying the provisions of section 4942(a)(2) are be					
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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? 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? li "Yes," list the years \			"	 	
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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 Yes X No If "Yes," list the years Yes X No If "Yes," list the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? If the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? If the provisions of section 4942(a)(2) (relating to incorrect valuation in vest with a tax of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) (relating to incorrect valuation in vest with a tax of the years listed in 2a, list the years listed, answer "No" and attach in vertical and excess business here. If the provisions of section 4942(a)(2) (relating to incorrect valuation invest with a tax of the years listed in 2a, list the years listed, answer "No" and attach invertical and attach invertical and attach invertical and attach invertical and attach interest in any business enterprise at any time during the year share. If the provisions of section 4942(a)(2) (relating to incorrect valuation invertical and attach invertical and attach invertical and attach invertical and attach invertical	-				
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during the year? b If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.) 1 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		c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.			
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had not been removed from jeopardy before the first day of the tax year beginning in 2013?			4a	ļ	X
			1		\ . ,
) DE	

Part VII-B	Statements Regarding Activities for Which F	form 4720 May Be F	Required (continu	ued)			
5a During the y	ear did the foundation pay or incur any amount to:	- 	-				
' (1) Carry or	n propaganda, or otherwise attempt to influence legislation (section	4945(e))?	Ye	s X No			
(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'		Ye	s X No			
(4) Provide	a grant to an organization other than a charitable, etc., organization	n described in section					
509(a)(1), (2), or (3), or section 4940(d)(2)?		Ye	s X No			
(5) Provide	for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or fo	or				
	rention of cruelty to children or animals?			s X No			
b If any answe	r is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und	ler the exceptions described if	n Regulations				
=	945 or in a current notice regarding disaster assistance (see instru		J	N/A	5b		
	is relying on a current notice regarding disaster assistance check h	•			\top		
-	r is "Yes" to question 5a(4), does the foundation claim exemption fr	•	ned				
	responsibility for the grant?			s 🗆 No			
•	tach the statement required by Regulations section 53.4945		,				
	dation, during the year, receive any funds, directly or indirectly, to						
	enefit contract?	, promission on	☐ Ye	s X No		1	
•	dation, during the year, pay premiums, directly or indirectly, on a p	ersonal benefit contract?			6b	x	
	6b, file Form 8870				-		
	during the tax year, was the foundation a party to a prohibited tax s	helter transaction?		s X No			
•	the foundation receive any proceeds or have any net income attribu				7b	-	
Part VIII	Information About Officers, Directors, Trusto		nagers. Highly				
	Paid Employees, and Contractors						
1 List all offic	ers, directors, trustees, foundation managers and their	compensation.					
		(b) Title, and average hours per week devoted	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e)	Expense unt, other	
	(a) Name and address	to position	(If not paid, enter -0-)	and deferred	acco	ount, other owances	
ROBERT A	. SMITH	TRUSTEE	·				
	ANEA PARTNERS, THREE NEWTON E						
	MA 02462	1.00	0.	0.		0.	
		TRUSTEE					
	ANEA PARTNERS, THREE NEWTON E		[
	MA 02462	1.00	0.	0.		0.	
							
					1		
-					 -		
					1		
2 Compensat	ion of five highest-paid employees (other than those inc	luded on line 1). If none,	enter "NONE."	 			
	and address of each analysis and mare than CEO 000	(b) Title, and average		(d) Contributions to employee benefit plans and deferred compensation	(e)	Expense	
(a) Nan	ne and address of each employee paid more than \$50,000	'hours per week devoted to position	(c) Compensation	and deferred	acco	Expense ount, other owances	
ŇC	ONE			00 mpt			
		······································					
			1				
			}				
			1				
		-	 		\vdash		
	· · · · · · · · · · · · · · · · · · ·						
Total number of	other employees paid over \$50,000	·		•		0	
				Form	990-	PF (2013)	
					-	/	

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FOUNDATION C/O CASTANEA PARTNERS

Part VIII Information About Officers, Directors, Trustees, Foundary Paid Employees, and Contractors (continued)	ation Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, enter	r "NONE."	
(a) Name and address of each person paid more than \$50,000 NONE	(b) Type of service	(c) Compensation
		-
	_	
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 statis number of organizations and other beneficiaries served, conferences convened, research papers pro	stical information such as the duced, etc.	Ехрепѕеѕ
1 NOT APPLICABLE		0.
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 or	lines 1 and 2.	Amount
1		
2		
All other program-related investments. See instructions. 3 N/A		
		0.
Total Add lines 1 through 3	D	0.

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.) Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: 6,850,752. a Average monthly fair market value of securities 1a 95,430. b Average of monthly cash balances 1b 10 c Fair market value of all other assets 6,946,182. 1d d Total (add lines 1a, b, and c) e Reduction claimed for blockage or other factors reported on lines 1a and 0. 1c (attach detailed explanation) 2 Acquisition indebtedness applicable to line 1 assets 6,946,182. 3 Subtract line 2 from line 1d 104,193. 4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) 6,841,989. Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 5 342,099. Minimum investment return. Enter 5% of line 5 Part XI | Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here \blacktriangleright and do not complete this part.) 342,099. Minimum investment return from Part X, line 6 16,668 2a Tax on investment income for 2013 from Part VI, line 5 2a 2b b Income tax for 2013. (This does not include the tax from Part VI.) 16,668. c Add lines 2a and 2b 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) 325,431 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 Part XII Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: 285,110. a Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 1a **b** Program-related investments - total from Part IX-B 1b Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes 2 Amounts set aside for specific charitable projects that satisfy the: 3a a Suitability test (prior IRS approval required) 3b b Cash distribution test (attach the required schedule) 285,110. Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment 5 income. Enter 1% of Part I, line 27b 6 285. 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.

Form **990-PF** (2013)

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Form 990-PF (2013)

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI,		, , , , , , , , , , , , , , , , , , , ,		
line 7			<u>-</u>	325,431.
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:		<u>U•</u>		
a From 2008 409, 260.				
bFrom 2009 770,718.				
c From 2010 809,654.				
dFrom 2011 34,198.				
eFrom 2012 59,611.		•		
f Total of lines 3a through e	2,083,441.			
4 Qualifying distributions for 2013 from				
Part XII, line 4: ▶\$ 285,110.				
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				285,110.
e Remaining amount distributed out of corpus	0.			40 201
Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a))	40,321.			40,321.
6 Enter the net total of each column as indicated below:	:			
2 Corpus Add lines 3f, 4c, and 4e Subtract line 5	2,043,120.			
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				0.
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	368,939.			
9 Excess distributions carryover to 2014.			-	
Subtract lines 7 and 8 from line 6a	1,674,181.			
10 Analysis of line 9:				
a Excess from 2009 770,718.				
b Excess from 2010 809,654.				
c Excess from 2011 34, 198.				
dExcess from 2012 59,611.				
e Excess from 2013	<u> </u>		<u></u>	Form 990-PF (2013)

	ION C/O CAS			22-38	50789 Page II
Part XIV Private Operating Fo	<u>i</u>		I-A, question 9)	N/A	
1 a If the foundation has received a ruling or		,			
foundation, and the ruling is effective for	•	• .	▶	,	
b Check box to indicate whether the found		g foundation described		4942(j)(3) or 49	42(j)(5)
2 a Enter the lesser of the adjusted net	Tax year	0.5575	Prior 3 years	10.00/0	
income from Part I or the minimum	(a) 2013	(b) 2012	(c) 2011	(d) 2010	(e) Total
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)				1	
(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 Info	rmation (Comple	te this part only	if the foundation	n had \$5,000 or mo	re in assets
at any time during the	he year-see instr	uctions.)		·	
1 Information Regarding Foundatio	n Managers:				
a List any managers of the foundation who	o have contributed more t	than 2% of the total con	tributions received by the	e foundation before the clos	se of any tax
year (but only if they have contributed m	iore than \$5,000). (See se	ection 507(d)(2).)			·
SEE STATEMENT 9					
b List any managers of the foundation who			(or an equally large port	on of the ownership of a pa	artnership or
other entity) of which the foundation has	s a 10% or greater interes	t.			•
NONE					
2 Information Regarding Contributi	on, Grant, Gift, Loan,	Scholarship, etc., P	Programs:		
Check here X if the foundation o				not accept unsolicited requ	ests for funds. If
the foundation makes gifts, grants, etc. ((see instructions) to indiv	iduals or organizations	under other conditions, c	omplete items 2a, b, c, and	d.
a The name, address, and telephone numl	ber or e-mail address of the	he person to whom app	lications should be addre	essed:	
N/A					
b The form in which applications should b	e submitted and informat	ion and materials they s	should include:		
N/A					
c Any submission deadlines:					
N/A					-
d Any restrictions or limitations on awards	s, such as by geographica	il areas, charitable fields	s, kinds of institutions, or	other factors:	
N/A					

Supplementary Information (continued) Part XV 3 ' Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, show any relationship to any foundation manager or substantial contributor Purpose of grant or contribution Foundation status of recipient Amount Name and address (home or business) a Paid during the year SEE ATTACHED STATEMENT A NONE PUBLIC CHARITY 277,280. 277,280. ➤ 3a b Approved for future payment NONE **▶** 3b Total

•				
XVI-A	Analysis of	Income-I	Producina	Activities

ter gross amounts unless otherwise indicated.	Unrelated t				by section 512, 513, or 514 (e)		
Program service revenue:	(a) Business code	(b) Amount	(C) Exclu- sion code	(d) Amount	Related or exempt function income		
1							
				-			
Fees and contracts from government agencies							
Nembership dues and assessments							
nterest on savings and temporary cash							
nvestments			14	50,794. 78,166.			
Dividends and interest from securities			14	78,166.			
let rental income or (loss) from real estate:							
Debt-financed property			1				
Not debt-financed property							
let rental income or (loss) from personal							
property							
Other investment income							
Gain or (loss) from sales of assets other							
han inventory			18	715,683.			
Net income or (loss) from special events							
Gross profit or (loss) from sales of inventory							
Other revenue:			1 1				
a							
b	_		\perp				
c							
d	_						
de				0.1.1.6.13			
e Subtotal. Add columns (b), (d), and (e)		0	•	844,643.	0.4.4.6		
d e Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e)		0	•	844,643.	844,6		
d e Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculation	s.)			13	844,6		
d e Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculation art XVI-B Relationship of Activitie	s.)	nplishment of E	exempt P	13	844,6		
d e Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculation art XVI-B Relationship of Activitien ne No. Explain below how each activity for which	s.) es to the Accor	nplishment of E	exempt P	13			
Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculation art XVI-B Relationship of Activitie The No. Explain below how each activity for which the foundation's exempt purposes (other)	s.) es to the Accor	nplishment of E	exempt P	13			
d e Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculation art XVI-B Relationship of Activitie ne No. Explain below how each activity for which	s.) es to the Accor	nplishment of E	exempt P	13			
Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculation art XVI-B Relationship of Activitie The No. Explain below how each activity for which the foundation's exempt purposes (other)	s.) es to the Accor	nplishment of E	exempt P	13			
Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculation art XVI-B Relationship of Activitie the No. Explain below how each activity for which the foundation's exempt purposes (other	s.) es to the Accor	nplishment of E	exempt P	13			
Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculation art XVI-B Relationship of Activitie the No. Explain below how each activity for which the foundation's exempt purposes (other	s.) es to the Accor	nplishment of E	exempt P	13			
Subtotal. Add columns (b), (d), and (e) Fotal. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculation art XVI-B Relationship of Activitie the foundation's exempt purposes (other	s.) es to the Accor	nplishment of E	exempt P	13			
Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculation art XVI-B Relationship of Activitie the foundation's exempt purposes (other	s.) es to the Accor	nplishment of E	exempt P	13			
Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculation art XVI-B Relationship of Activitie the foundation's exempt purposes (other	s.) es to the Accor	nplishment of E	exempt P	13			
Subtotal. Add columns (b), (d), and (e) Fotal. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculation art XVI-B Relationship of Activitie the foundation's exempt purposes (other	s.) es to the Accor	nplishment of E	exempt P	13			
Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculation art XVI-B Relationship of Activitie the No. Explain below how each activity for which the foundation's exempt purposes (other	s.) es to the Accor	nplishment of E	exempt P	13			
Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculation art XVI-B Relationship of Activitie the No. Explain below how each activity for which the foundation's exempt purposes (other	s.) es to the Accor	nplishment of E	exempt P	13			
Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculation art XVI-B Relationship of Activitie the foundation's exempt purposes (other	s.) es to the Accor	nplishment of E	exempt P	13			
Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculation art XVI-B Relationship of Activitie The No. Explain below how each activity for which the foundation's exempt purposes (other)	s.) es to the Accor	nplishment of E	exempt P	13			
Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculation art XVI-B Relationship of Activitie The No. Explain below how each activity for which the foundation's exempt purposes (other)	s.) es to the Accor	nplishment of E	exempt P	13			
d e Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculation art XVI-B Relationship of Activitie ne No. Explain below how each activity for which the foundation's exempt purposes (other	s.) es to the Accor	nplishment of E	exempt P	13			
d e Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculation art XVI-B Relationship of Activitie ne No. Explain below how each activity for which the foundation's exempt purposes (other	s.) es to the Accor	nplishment of E	exempt P	13			
d e Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculation art XVI-B Relationship of Activitie ne No. Explain below how each activity for which the foundation's exempt purposes (other	s.) es to the Accor	nplishment of E	exempt P	13			
e Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) ee worksheet in line 13 instructions to verify calculation Part XVI-B Relationship of Activities tine No. Explain below how each activity for which the foundation's exempt purposes (other	s.) es to the Accor	nplishment of E	Exempt P	13			
e Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) ee worksheet in line 13 instructions to verify calculation Part XVI-B Relationship of Activities tine No. Explain below how each activity for which the foundation's exempt purposes (other	s.) es to the Accor	nplishment of E	Exempt P	13			
Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculation art XVI-B Relationship of Activitie the foundation's exempt purposes (other	s.) es to the Accor	nplishment of E	Exempt P	13			

Form 990-PF (2013) Part XVII

FOUNDATION C/O CASTANEA PARTNERS Information Regarding Transfers To and Transactions and Relationships With Noncharitable

		Exempt Organ								
1	Did the or	ganization directly or indir	ectly engage in any	of the followin	g with any other organizatio	in described in section	on 501(c) of		Yes	No
	the Code (other than section 501(c)	(3) organizations) o	r in section 52	7, relating to political organi	izations?				
а	Transfers	from the reporting founda	ation to a noncharital	ble exempt org	ganization of:			1		
	(1) Cash							1a(1)		Х
	(2) Other	assets	•		• ••	•	•	1a(2)		X
h	Other tran		-					1.5/5/4		
•	•	of assets to a noncharital	hie evemnt organizat	inn				16(1)		Х
		nases of assets from a noi				•		15(1)		X
	• •		•	gamzation		-				$\frac{x}{x}$
		il of facilities, equipment,			•	•	•	1b(3)		$\frac{x}{x}$
		bursement arrangements						1b(4)		
		s or loan guarantees			•			1b(5)		X
	` '	rmance of services or me	•	•	•		•	1b(6)		X
		f facilities, equipment, ma						10		X
đ					dule. Column (b) should alv				ets,	
					ed less than fair market valu	e in any transaction	or sharing arrangement	, show in		
7-1		1) the value of the goods,			avamat assessed = -					
(a)ı	ine no	(b) Amount involved	(c) Name of		exempt organization	(0) Description	of transfers, transactions, ar	nd sharing arra	angeme	nts
				N/A					_	
		· · · · · · · · · · · · · · · · · · ·	ļ <u> —</u>				<u>.</u>			
						<u> </u>			_	
					•·		ı.			
								-		
				-						
					· -					
					•					
									_	
2a	is the fou	ndation directly or indirec	tly affiliated with, or i	elated to, one	or more tax-exempt organiz	zations described				
		501(c) of the Code (othe	=		· · · · · · · · · · · · · · · · · · ·			Yes	X	No
b	If "Yes." c	omplete the following sch	edule.	,						
		(a) Name of org		_	(b) Type of organization	((c) Description of relation	nship		
		N/A					<u>· ·</u>			
_										
							·			
	Unde	r penalties of perjury, I declare	that I have examined thi	s return, includir	ng accompanying schedules and	statements, and to the I	best of my knowledge			
Si	ign and b	elief, it is true, correct, and cor	mplete Declaration of pr	eparer (other tha	n taxpayer) is based on all inform	nation of which preparer	rias ariy kilowledge	May the IRS d eturn with the	prepar	er
	ere	12	1		16/4/	TRUSTE		shown below (see ins	7' I
	Sig	nature of officer or trustee			Date	Title	<u></u>	LALL TES		J No ∣
		Print/Type preparer's na		Preparer's s		Date	Check if PTI	N		
		I			\	,	self- employed	•		
P	aid	DIAMA C	shed	108		5675		00188	201	
	reparer	Firm's name DEL		LLP			Firm's EIN > 86-			
	se Only		CTITE TWV	י דידוב			FIIII SEIN POO-	T007/	, 4	
J	Je Jiny	Firm's address ▶ 20	ישאמשם ה	יע פייים עי	<u> </u>	-	 			
		•	STON, MA		12.1		Dhana a 617	127 2	000	
		BC	ASTON, MA	02110			Phone no. 617-	Form 990	_	
								FORM MMI		ついきない

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.qov/form990 ·

OMB No 1545-0047

2013

Name of the organization

ROBERT AND DANA SMITH CHARITABLE FOUNDATION C/O CASTANEA PARTNERS

Employer identification number

22-3850789

Organiza	ation type (check or	ne):
Filers of	:	Section:
Form 990	or 990-EZ	501(c)() (enter number) organization
		4947(a)(1) nonexempt chantable trust not treated as a private foundation
		527 political organization
Form 99	D-PF	501(c)(3) exempt private foundation
		4947(a)(1) nonexempt chantable trust treated as a private foundation
		501(c)(3) taxable private foundation
	nly a section 501(c)	s covered by the General Rule or a Special Rule . (7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.
	For an organization contributor Complete	n filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one lete Parts I and II.
Special	Rules	
	509(a)(1) and 170(l	c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 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% i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
	total contributions	c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, of more than \$1,000 for use exclusively for religious, charitable, scientific, literary, or educational purposes, or cruelty to children or animals. Complete Parts I, II, and III.
	contributions for u If this box is check purpose Do not co	c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, ise exclusively for religious, chantable, etc., purposes, but these contributions did not total to more than \$1,000. Red, enter here the total contributions that were received during the year for an exclusively religious, chantable, etc., complete any of the parts unless the General Rule applies to this organization because it received nonexclusively e, etc., contributions of \$5,000 or more during the year
but it m	ust answer "No" on	hat is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), i Part IV, line 2, of its Form 990:PF, Part I, line 2, to 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
ROBERT AND DANA SMITH CHARITABLE
FOUNDATION C/O CASTANEA PARTNERS

Employer identification number

22-3850789

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	ROBERT SMITH C/O CASTANEA PARTNERS, THREE NEWTON EXECUTIVE PARK, STE 304 NEWTON, MA 02462	- \$	Person Payroll Noncash X (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
2	ROBERT SMITH C/O CASTANEA PARTNERS, THREE NEWTON EXECUTIVE PARK, STE 304 NEWTON, MA 02462	- \$	Person Payroll Noncash X (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
3	ROBERT SMITH C/O CASTANEA PARTNERS, THREE NEWTON EXECUTIVE PARK, STE 304 NEWTON, MA 02462	- - \$	Person Payroll Noncash X (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		- - - -	Person Payroll Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$\$	Person Payroll Noncash (Complete Part II for noncash contributions)

Name of organization

ROBERT AND DANA SMITH CHARITABLE
FOUNDATION C/O CASTANEA PARTNERS

Employer identification number

22-3850789

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

No. rom Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	323,000 SHRS JPMORGAN CHASE & CO	_	
		\$ 420,385.	12/31/13
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
2	1,267 SHS PROCTER & GAMBLE COMPANY	_	
		103,147.	12/31/13
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
3	5,100 SHS TWENTY-FIRST CENTURY FOX, INC	_	
:		179,367.	12/31/13
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		 5	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		 _	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		_	

Schedule B (Form 990, 990-EZ, or 990-PF) (2013) Page 4 Name of organization Employer identification number ROBERT AND DANA SMITH CHARITABLE FOUNDATION C/O CASTANEA PARTNERS 22-3850789 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 (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (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

FORM 990-PF INTERES	ST ON SAVIN	IGS AND TEM	PORARY	CASH IN	VESTMENTS	STATEMENT 1	
SOURCE		REVE	(A) REVENUE PER BOOKS		(B) VESTMENT COME	(C) ADJUSTED NET INCOME	
GOLDMAN SACHS XX248 GOLDMAN SACHS XX466 GOLDMAN SACHS XX494	-1	5	0,714. 49. 31.		50,714. 49. 31.		
TOTAL TO PART I, LI	NE 3	5	0,794.		50,794.		
FORM 990-PF	DIVIDENDS	S AND INTER	EST FRO	OM SECUR	ITIES	STATEMENT 2	
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDEND	RI	(A) EVENUE R BOOKS	(B) NET INVES MENT INCO		
GOLDMAN SACHS XX248-1 GOLDMAN SACHS XX466-1	1. 54,995.		0. 0.	1. 54,995.		1.	
GOLDMAN SACHS XX494-8	23,170.		0.	23,170.	23,17		
TO PART I, LINE 4	78,166		0.	78,166.	78,16	56.	
FORM 990-PF		ACCOUNTI	NG FEE			STATEMENT 3	
DESCRIPTION		(A) EXPENSES PER BOOKS	NET II	B) NVEST- INCOME	(C) ADJUSTED NET INCOM		
DELOITTE		7,800.		0.		7,800.	
TO FORM 990-PF, PG	1, LN 16B	7,800.		0.		7,800.	

FORM 990-PF	OTHER PROFES	SIONAL FEES	S	TATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS		(C) ADJUSTED NET INCOME	(D) CHARITAI PURPOSI	ES ——
GOLDMAN SACHS TO FORM 990-PF, PG 1, LN 16C	11,242.	·			0.
10 FORM 990-FF, PG 1, LN 16C	11,242.	11,242.		· 	0.
FORM 990-PF	TAX	ES	S	TATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME		(D) CHARITAI PURPOSI	
IRS TAX	21,145.	0.			0.
TO FORM 990-PF, PG 1, LN 18	21,145.	0.		· 	0.
TO FORM 990-PF, PG 1, LN 18 =	21,145. OTHER E		S	TATEMENT	
=	OTHER E (A) EXPENSES		(C)	TATEMENT (D) CHARITAI PURPOSI	6 BLE
FORM 990-PF	OTHER E (A) EXPENSES	(B) NET INVEST- MENT INCOME	(C) ADJUSTED	(D) CHARITAI PURPOSI	6 BLE
FORM 990-PF DESCRIPTION	OTHER E (A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED	(D) CHARITAI PURPOSI	6 BLE
FORM 990-PF DESCRIPTION BANK FEES TO FORM 990-PF, PG 1, LN 23	OTHER E (A) EXPENSES PER BOOKS 30.	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITAI PURPOSI	6 BLE ES
FORM 990-PF DESCRIPTION BANK FEES TO FORM 990-PF, PG 1, LN 23	OTHER E (A) EXPENSES PER BOOKS 30.	XPENSES (B) NET INVEST- MENT INCOME 0.	(C) ADJUSTED NET INCOME	(D) CHARITAI PURPOSI	6 BLE ES
FORM 990-PF DESCRIPTION BANK FEES TO FORM 990-PF, PG 1, LN 23 FORM 990-PF OTHER DECREAS:	(A) EXPENSES PER BOOKS 30. 30.	(B) NET INVEST- MENT INCOME 0. 0. SETS OR FUND B	(C) ADJUSTED NET INCOME	(D) CHARITAI PURPOSI	6 BLE ES 30.

FORM 990-PF CORPORATE	STOCK	STATEMENT	8
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	ı
GOLDMAN SACHS	6,418,697.	6,838,78	1.
TOTAL TO FORM 990-PF, PART II, LINE 10B	6,418,697.	6,838,78	1.
FORM 990-PF PART XV - LIN		STATEMENT	9

NAME OF MANAGER

ROBERT A. SMITH DANA WEISS SMITH

ROBERT & DANA SMITH FAMILY FOUNDATION 11/30/2014

22-3850789

FORM 990PF, PART XV, LINE 3a CONTRIBUTIONS PAID

	Foundation Statu	s		Purpose of grant or	
Name of the Recipient	of Recipient	Relationship	Status	contribution	Amount
FACING HISTORY AND OURSELVES	501(c)(3)	NONE	PUBLIC CHARITY	GENERAL WELFARE	25,000 00
PEARL SCHOOL	501(c)(3)	NONE	PUBLIC CHARITY	EDUCATION	62,500 00
NOBLE AND GREENOUGH SCHOOL	501(c)(3)	NONE	PUBLIC CHARITY	EDUCATION	160,000 00
FRESHMAN FIFTEEN BOSTON	501(c)(3)	NONE	PUBLIC CHARITY	EDUCATION	1,100 00
BIG SKY COMMUNITY CORPORATION	501(c)(3)	NONE	PUBLIC CHARITY	GENERAL WELFARE	5,000 00
DEBATE MATE	501(c)(3)	NONE	PUBLIC CHARITY	EDUCATION	4,000 00
WOMEN IN ACTION	501(c)(3)	NONE	PUBLIC CHARITY	GENERAL WELFARE	7,500 00
THE ARTS COUNCIL OF BIG SKY	501(c)(3)	NONE	PUBLIC CHARITY	GENERAL WELFARE	7,080 00
ACES	501(c)(3)	NONE	PUBLIC CHARITY	GENERAL WELFARE	5,100 00

277,280 00

Form **8868** (Rev. January 2014)

Department of the Treasury

Department of the Treasury Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

File a separate application for each return.

▶ Information about Form 8868 and its instructions is at www.irs gov/form8868 ·

OMB No. 1545-1709

•	re filing for an Automatic 3-Month Extension, complet	-			•	لیما ﴿
	re filing for an Additional (Not Automatic) 3-Month Ex					
Electronic	mplete Part II unless you have already been granted a cifling (e-file). You can electronically file Form 8868 if y	ou need a	a 3-month automatic extension of tin	ne to file (6	months for	
	o file Form 990-T), or an additional (not automatic) 3-moi					
	file any of the forms listed in Part I or Part II with the exc					
Personal E	Benefit Contracts, which must be sent to the IRS in pap	er format	(see instructions) For more details of	on the elec	tronic filing o	of this form,
visit www.	irs gov/efile and click on e-file for Chanties & Nonprofits	i				
Part I	Automatic 3-Month Extension of Time	Only s	submit original (no copies nee	eded).		
A corpora	tion required to file Form 990-T and requesting an autor	natic 6-mo	onth extension - check this box and	complete		_
art I only				•		
All other c	orporations (including 1120-C filers), partnerships, REM ime tax returns.	IICs, and ti	rusts must use Form 7004 to reques	_		na number
Type or	Name of exempt organization or other filer, see instru	otiono			r's identifyi	
	ROBERT AND DANA SMITH CHAR		r.	Employer	identificatio	n number (EIN) or
print	FOUNDATION C/O CASTANEA PAI				22-38	50700
File by the						
due date for filing your return See	Number, street, and room or suite no. If a PO box, s THREE NEWTON EXECUTIVE PARI			Social sec	cunty number	er (SSN)
instructions	City, town or post office, state, and ZIP code. For a for NEWTON, MA 02462	oreign add	ress, see instructions.			
Enter the	Return code for the return that this application is for (file	e a separa	te application for each return)			0 4
			<u> </u>	_		
Applicati	on	Return	Application			Return
ls For		Code	Is For			Code
	or Form 990-EZ	01	Form 990-T (corporation)			07
Form 990	·BL	02	Form 1041-A			08
Form 472	0 (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
Teleph If the c	ROBERT SMITH books are in the care of \longrightarrow 3 NEWTON EXECU- some No. \longrightarrow (617) 630-2400 organization does not have an office or place of business for a Group Return, enter the organization's four digit	s in the Ur	Fax No ▶			▶ □
		7			_	
box ▶ L	·····		ach a list with the names and EINs of		ers the exte	nsion is for.
		•	to file Form 990-1) extension of time the items of the organization name		The extension	on
ıs fo	or the organization's return for:					
►Į	calendar year or		00 001			
►l	X tax year beginning DEC 1, 2013	, an	nd ending NOV 30, 2014	<u> </u>	<u> </u>	
2 If th	he tax year entered in line 1 is for less than 12 months, c Change in accounting period	check reas	son: Initial return	Final retur	n	
20 16 41		- C C C C C C C C C C C C C C C C C C C	enter the tentative text less envi		_	
	ns application is for Forms 990-BL, 990-PF, 990-T, 4720	, טו טטטש,	enter the tentative tax, less any	3-	•	30,000.
	nrefundable credits. See instructions.	·		3a	\$	30,000.
	nis application is for Forms 990-PF, 990-T, 4720, or 6069					15 000
	mated tax payments made. Include any prior year over			3b	\$	15,000.
	ance due. Subtract line 3b from line 3a. Include your pa		· · · · · · · · · · · · · · · · · · ·		•	15,000.
	using EFTPS (Electronic Federal Tax Payment System)			3c	\$	
Caution.	If you are going to make an electronic funds withdrawal	ı (direct de	eon) with this Form 8868, see Form	8453-EO ai	na Form 887	9-EO for payment

LHA 323841 12-31-13 For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form 8868 (Rev. 1-2014)