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

2014

Open to Public Inspection

For calendar year 2014 or tax year beginning , and ending

Name of foundation
The Thoracic Foundation
C/O Taylor, Ganson & Perrin, LLP

A Employer identification number
04-2226641

Number and street (or P O box number if mail is not delivered to street address) | Room/suite
160 Federal Street, 20th Fl.

B Telephone number
(617)951-2777

City or town, state or province, country, and ZIP or foreign postal code
Boston, MA 02110

C If exemption application is pending, check here ▶ ☐

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

D 1. Foreign organizations, check here ▶ ☐

2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

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

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

I Fair market value of all assets at end of year (*from Part II, col. (c), line 16*) ▶$ 7,133,573.

J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) (*Part I, column (d) must be on cash basis.*)

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)
Revenue	1 Contributions, gifts, grants, etc., received				
	2 Check ▶ ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	4,307.	4,307.	4,307.	Statement 1
	4 Dividends and interest from securities	68,706.	68,706.	68,706.	Statement 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	238,125.			
	b Gross sales price for all assets on line 6a 3,587,425.				
	7 Capital gain net income (from Part IV, line 2)		238,125.		
	8 Net short-term capital gain			N/A	
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss)				
	11 Other income				
	12 **Total.** Add lines 1 through 11	311,138.	311,138.	73,013.	
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	28,484.	28,064.	0.	0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees Stmt 3	10,741.	10,741.	0.	0.
	c Other professional fees Stmt 4	74,481.	74,481.	0.	0.
	17 Interest				
	18 Taxes Stmt 5	32,915.	33,384.	0.	0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	1,611.	1,611.	0.	0.
	22 Printing and publications				
	23 Other expenses Stmt 6	139.	139.	0.	0.
	24 **Total operating and administrative expenses.** Add lines 13 through 23	148,371.	148,420.	0.	0.
	25 Contributions, gifts, grants paid	298,831.			298,831.
	26 **Total expenses and disbursements.** Add lines 24 and 25	447,202.	148,420.	0.	298,831.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	<136,064.>			
	b **Net investment income** (if negative, enter -0-)		162,718.		
	c **Adjusted net income** (if negative, enter -0-)			73,013.	

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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	17,857.	4,688.	4,688.
	2 Savings and temporary cash investments	558,235.	309,318.	309,318.
	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	29,246.	110,391.	139,180.
	b Investments - corporate stock Stmt 8	4,273,284.	4,317,965.	6,600,446.
	c Investments - corporate bonds Stmt 9	50,568.	60,758.	66,409.
	11 Investments - land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other Stmt 10	29,362.	19,036.	13,532.
	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 I)	4,958,552.	4,822,156.	7,133,573.
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** ▶ [X] **and complete lines 24 through 26 and lines 30 and 31.**			
	24 Unrestricted	4,958,552.	4,822,156.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ [ ] **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**	4,958,552.	4,822,156.	
	31 **Total liabilities and net assets/fund balances**	4,958,552.	4,822,156.	

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	4,958,552.
2 Enter amount from Part I, line 27a	2	<136,064.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	4,822,488.
5 Decreases not included in line 2 (itemize) ▶ Adjustment to Book values	5	332.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	4,822,156.

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	Short Term capital gains SSB See attached	P	Various	Various
b	Long Term capital gains SSB See attached	P	Various	Various
c	Other Long Term capital gains SSB See attached	P	Various	Various
d	Long Term capital gains RBC See attached	P	Various	Various
e	sale of 100 shs Catepillar Inc	P	08/17/95	05/12/14
f	sale of 100 shs Dow Chemical Company	P	08/17/95	05/12/14
g	sale of 100 shs Exxon Mobil Corp	P	08/17/95	05/12/14
h	sale of 300 shs Illinois Tool Works Inc	P	06/23/11	02/13/14
i	sale of 100 shs IBM	P	09/25/95	05/12/14
j	Capital Gains Dividends			
k				
l				
m				
n				
o				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	2,842,025.		2,758,711.	83,314.
b	521,260.		462,416.	58,844.
c	81,569.		46,803.	34,766.
d	73,873.		56,748.	17,125.
e	10,597.		1,717.	8,880.
f	4,994.		2,485.	2,509.
g	10,200.		1,720.	8,480.
h	23,437.		16,347.	7,090.
i	19,192.		2,353.	16,839.
j	278.			278.
k				
l				
m				
n				
o				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a				** 83,314.
b				58,844.
c				34,766.
d				17,125.
e				8,880.
f				2,509.
g				8,480.
h				7,090.
i				16,839.
j				278.
k				
l				
m				
n				
o				

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	238,125.
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	83,314.

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** (Short-term)

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				
b	See Attached Statement			
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				
b				
c				
d				
e	3,587,425.		3,349,300.	238,125.

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				
b				
c				
d				
e				238,125.

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** 238,125.

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** 83,314.

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))
2013	220,000.	6,128,732.	.035896
2012	285,000.	5,446,470.	.052327
2011	431,129.	5,774,512.	.074661
2010	235,000.	5,360,603.	.043838
2009	234,515.	4,715,679.	.049731

2	**Total** of line 1, column (d)	2	.256453
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	.051291
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	6,853,946.
5	Multiply line 4 by line 3	5	351,546.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	1,627.
7	Add lines 5 and 6	7	353,173.
8	Enter qualifying distributions from Part XII, line 4	8	298,831.

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 ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: ______ (attach copy of letter if necessary-see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b		1	3,254.
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	3,254.
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	3,254.
6	Credits/Payments:			
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a 16,000.		
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	16,000.
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached		8	6.
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	12,740.
11	Enter the amount of line 10 to be: **Credited to 2015 estimated tax** ▶ 12,740. **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?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)?	1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file **Form 1120-POL** for this year?	1c		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.*	2		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*	3		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? *If "Yes," attach the statement required by General Instruction T.*	5		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?	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	X	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ MA			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation*	8b	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 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

Part VII-A Statements Regarding Activities *(continued)*

		Line	Yes	No
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 ▶ Bradley R. Cook, Trustee Telephone no. ▶ (617) 951-2777
Located at ▶ 160 Federal Street, Boston, Massachusetts ZIP+4 ▶ 02110

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** - Check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A

		Line	Yes	No
16	At any time during calendar year 2014, 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		X
	See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly 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.	Line	Yes	No
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ 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 ☒ 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 ☒ 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)? N/A	1b		
	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 2014?	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 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? ☐ Yes ☒ 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 ☒ No			
b	If "Yes," did it have excess business holdings in 2014 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 2014.)* 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 2014?	4b		X

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

5a During the year did the foundation pay or incur any amount to:			
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ 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 4945(d)(4)(A)? (see instructions)	☐ 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)?	N/A	5b	
Organizations relying on a current notice regarding disaster assistance check here	▶ ☐		
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A	☐ Yes ☐ No		
If "Yes," attach the statement required by Regulations section 53.4945-5(d)			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b	X
If "Yes" to 6b, file Form 8870.			
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ 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
Galen L. Stone 10 Longwood Drive, #422 Westwood, MA	Trustee 0.50	0.	0.	0.
Bradley R. Cook 160 Federal Street Boston, MA	Trustee 1.00	0.	0.	0.
Rev. Thomas J.S. Mikelson 3 Church Street Cambridge, MA	Trustee 0.50	0.	0.	0.

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

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

Total number of other employees paid over $50,000 ▶ 0

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	6,247,509.
b	Average of monthly cash balances		1b	710,812.
c	Fair market value of all other assets		1c	
d	**Total** (add lines 1a, b, and c)		1d	6,958,321.
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	6,958,321.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)		4	104,375.
5	**Net value of noncharitable-use assets**. Subtract line 4 from line 3. Enter here and on Part V, line 4		5	6,853,946.
6	**Minimum investment return**. Enter 5% of line 5		6	342,697.

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	342,697.
2a	Tax on investment income for 2014 from Part VI, line 5	2a 3,254.		
b	Income tax for 2014. (This does not include the tax from Part VI.)	2b		
c	Add lines 2a and 2b		2c	3,254.
3	Distributable amount before adjustments. Subtract line 2c from line 1		3	339,443.
4	Recoveries of amounts treated as qualifying distributions		4	0.
5	Add lines 3 and 4		5	339,443.
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	339,443.

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	298,831.
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	298,831.
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	0.
6	**Adjusted qualifying distributions**. Subtract line 5 from line 4	6	298,831.

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 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7				339,443.
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only			0.	
b Total for prior years: ____ , ____ , ____		0.		
3 Excess distributions carryover, if any, to 2014:				
a From 2009				
b From 2010				
c From 2011 88,430.				
d From 2012 16,171.				
e From 2013				
f **Total** of lines 3a through e	104,601.			
4 Qualifying distributions for 2014 from Part XII, line 4: ▶ $ 298,831.				
a Applied to 2013, 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 2014 distributable amount				298,831.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)	40,612.			40,612.
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	63,989.			
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 2013. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2014. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2015				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7	0.			
9 **Excess distributions carryover to 2015.** Subtract lines 7 and 8 from line 6a	63,989.			
10 Analysis of line 9:				
a Excess from 2010				
b Excess from 2011 47,818.				
c Excess from 2012 16,171.				
d Excess from 2013				
e Excess from 2014				

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 2014, 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			
	(a) 2014	(b) 2013	(c) 2012	(d) 2011	(e) Total
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:

Bradley R. Cook, Trustee, 160 Federal Street, Boston, Massachusetts 02110

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

Open

c Any submission deadlines:

None

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

None

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution **	Amount
a Paid during the year				
Action on Smoking and Health(ASH), 2013 H Street NW, Washington, DC 20006	none	Health	General funding for non-smokers rights	5,000.
Asthma & Allergy Found. of America,109 Highland Ave, Needham Hgts, MA 02494	none	Health	Asthma Education and Awareness	25,000.
Beth Israel Deaconess Surgery Foundation, 110 Francis St., Boston, MA 02115	none	Charity	Dr. Berger's Project-Lung Volume Reduction/Emphysema	50,000.
Campaign for Tobacco Free Kids, 1400 Eye St., NW Suite 1200, Washington,DC	none	Charity	Advocacy program - Kick Butts Day	20,000.
Campaign for Tobacco Free Kids, 1400 Eye St., NW Suite 1200, Washington,DC	none	Charity	Accountability program	40,000.
Total See continuation sheet(s)			▶ 3a	298,831.
b Approved for future payment				
None				
Total			▶ 3b	0.

Form **990-PF** (2014)

423611
11-24-14

** See Purpose of Grant continuations

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Children's Hospital 300 Longwood Ave, Boston, MA 02215	none	Charity	Asthma Program-Ms. Klements program	25,000.
Children's Hospital 300 Longwood Ave, Boston, MA 02215	none	Charity	Dr. Kim's research re: Lung Cancer research regarding understanding mechanism for	35,000.
Dana Farber Cancer Institute, 10 Brookline Place West, Brookline, MA 02445	none	Charity	Dr. Kwok-Kin Wong's research	35,000.
American Lung Association 4660 Totten Pond Road, #400 Waltham, MA 02451	none	Charity	To study the effects of marijuana smoking on lungs	10,000.
Tower Fund of San Jose State University One Washington Square San Jose, CA 95192	none	Charity	To be used for Native Youth Tobacco Prevention Project	53,831.
Total from continuation sheets				158,831.

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05-01-14

Part XV Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

Name of Recipient - Children's Hospital 300 Longwood Ave, Boston, MA 02215

Dr. Kim's research re: Lung Cancer research regarding understanding mechanism for metastasis

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	(b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	(d) Amount	(e) Related or exempt function income
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	4,307.	
4 Dividends and interest from securities			14	68,706.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	238,125.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		311,138.	0.

13 Total. Add line 12, columns (b), (d), and (e) 13 311,138.

(See worksheet in line 13 instructions to verify calculations.)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).

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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	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		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.

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

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

Bradley R. Cook | 6/15/15 | Trustee

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	Preparer's signature	Date	Check ☐ if self- employed	PTIN
Edward R. Martin, Esq.	Edward R. Martin	6/15/15		P00449787
Firm's name ▶ Taylor, Ganson & Perrin, LLP			Firm's EIN ▶ 04-1894190	
Firm's address ▶ 160 Federal Street, 20th Floor Boston, MA 02110			Phone no. (617)951-2777	

Form 990-PF (2014)

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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
RBC Dain Rauscher - Interest	2,944.	2,944.	2,944.
RBC Dain Rauscher - US Gov't Interest	531.	531.	531.
Winslow,Evans & Crocker, Inc.	832.	832.	832.
Total to Part I, line 3	4,307.	4,307.	4,307.

Form 990-PF Dividends and Interest from Securities Statement 2

Source	Gross Amount	Capital Gains Dividends	(a) Revenue Per Books	(b) Net Investment Income	(c) Adjusted Net Income
Mellon Dividends	30,387.	1.	30,386.	30,386.	30,386.
RBC Dain Rauscher Corporate Dividends	16,024.	0.	16,024.	16,024.	16,024.
State Street Divs.(Domestic)	19,513.	277.	19,236.	19,236.	19,236.
State Street Divs.(Foreign)	3,060.	0.	3,060.	3,060.	3,060.
To Part I, line 4	68,984.	278.	68,706.	68,706.	68,706.

Form 990-PF Accounting Fees Statement 3

Description	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Tax Preparation Fee	10,741.	10,741.	0.	0.
To Form 990-PF, Pg 1, ln 16b	10,741.	10,741.	0.	0.

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
State Street Agency fees	4,310.	4,310.	0.	0.
Lowell Blake & Associates	5,000.	5,000.	0.	0.
Taylor, Ganson & Perrin, LLP, for Administration Exps from 11/13-11/14	12,240.	12,240.	0.	0.
Essex Management	49,331.	49,331.	0.	0.
Medical consultant	3,600.	3,600.	0.	0.
To Form 990-PF, Pg 1, ln 16c	74,481.	74,481.	0.	0.

Form 990-PF Taxes Statement 5

Description	(a) Expenses Per Books	(b) Net Invest-ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Foreign Taxes paid Mellon Bank	946.	946.	0.	0.
Foreign Taxes paid from State Street Bank	65.	534.	0.	0.
Foreign Taxes paid RBC Dain Rauscher	1,288.	1,288.	0.	0.
2013 tax due	14,616.	14,616.	0.	0.
2014 estimated excise tax	16,000.	16,000.	0.	0.
To Form 990-PF, Pg 1, ln 18	32,915.	33,384.	0.	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
Form PC filing fee	35.	35.	0.	0.
RBC Investment expenses	39.	39.	0.	0.
ADR Fees Mellon	65.	65.	0.	0.
To Form 990-PF, Pg 1, ln 23	139.	139.	0.	0.

Form 990-PF U.S. and State/City Government Obligations Statement 7

Description	U.S. Gov't	Other Gov't	Book Value	Fair Market Value
25,000 United States Treasury Note	X			
CPN 2.125% due 5/31/15			25,118.	25,250.
5,795,000 2U Inc Muni Bonds		X	85,273.	113,930.
Total U.S. Government Obligations			25,118.	25,250.
Total State and Municipal Government Obligations			85,273.	113,930.
Total to Form 990-PF, Part II, line 10a			110,391.	139,180.

Form 990-PF Corporate Stock Statement 8

Description	Book Value	Fair Market Value
30 Shs. American International Group, Inc.	12,717.	1,680.
900 shs Lilly Eli & Co.	17,001.	62,091.
800 Shs. Royal Dutch Pete	23,540.	53,560.
1300 Shs. Southwest Airlines	7,366.	55,016.
666 Shs. Analog Devices	6,785.	36,976.
1000 Shs. Microsoft Corp.	6,226.	46,450.
789 Shs. AT & T Communications	17,949.	26,503.
400 shs Omnicom Group	10,447.	30,988.
200 shs Pfizer Inc.	5,814.	6,230.
300 shs Southern Co.	8,541.	14,733.
435 shs State Street Corp	19,323.	34,148.
400 shs Medtronic Inc.	19,503.	28,880.
400 shs General Electric	14,156.	10,108.
400 shs Corning Inc.	7,604.	9,172.
200 shs Deere & Co.	11,390.	17,694.
117 shs Ecotality Inc.	5,040.	0.
800 shs Intel Corp	6,620.	29,032.
1,300 shs Texas Instruments	7,772.	69,505.
100 shs Fedex Corp	10,921.	17,366.
200 shs Novartis AG Sponsored ADR	11,592.	18,532.
1,200 shs Roche Holdings Ltd Sponsored ADR	26,867.	40,788.
600 shs PNC Financial Services Group	14,961.	54,738.
246 shs Freeport-McMoran C & G	10,190.	5,747.
700 shs Dow Chemical Co.	17,397.	31,927.
150 shs McDonald's Corp Inc.	10,545.	14,055.
800 shs The Procter & Gamble Company	19,825.	72,872.
200 shs Aflac Inc.	7,524.	12,218.
80 shs Simon Property Group Inc.	7,327.	14,569.
270 shs US Bancorp	3,448.	12,137.

200 shs Accenture PLC	11,015.	17,862.
26 shs Citigroup Inc.	6,147.	1,407.
16 shs American International Group Cw Warrant 1/19/21	261.	394.
275 shs Nestle S A Sponsored ADR Repstg Reg	19,650.	20,061.
400 shs Volkswagon	19,535.	17,608.
930 shs Abbott Laboratories	7,649.	41,869.
400 shs Caterpillar Inc	6,869.	36,612.
500 shs Exxon Mobil Corp	8,601.	46,225.
25 shs Google Inc.Class A	6,616.	13,267.
25 shs Google Inc.-Class C	6,634.	13,160.
400 shs IBM	9,413.	64,176.
210 shs Rockwell Automation	24,430.	23,352.
250 shs Sempra Energy	13,330.	27,840.
40 shs Washington Prime Group	462.	689.
150 shs Akamai Technologies Inc.	4,731.	9,444.
600 shs Aptargroup Inc.	15,282.	40,104.
500 shs Corning	7,911.	11,465.
125 shs Costco Wholesale Corp	13,949.	17,719.
150 shs Emerson Electric	5,252.	9,260.
500 shs Enterprise Products Partners	14,104.	18,060.
100 shs Exxon Mobil Corp	8,947.	9,245.
150 shs FMC Corp	11,176.	8,555.
400 shs General Electric	9,686.	10,108.
200 shs Genuine Parts Co.	7,052.	21,314.
25 shs Google Inc. CL A	6,850.	13,267.
25 shs Google Inc. CL C	6,829.	13,160.
100 shs Home Depot Inc.	8,206.	10,497.
75 shs IDEXX Laboratories Corp	6,708.	11,120.
500 shs Intel Corp	2,905.	18,145.
200 shs IBM	28,319.	32,088.
200 shs IPG Photonics Corp	12,410.	14,984.
100 shs Johnson & Johnson	248.	10,457.
150 shs Lindsay Corporation	13,544.	12,861.
2300 shs McDonalds Corp	17,889.	28,110.
500 shs Microsoft Corp.	14,987.	23,225.
100 shs MSC Industrial Direct Co	7,707.	8,125.
250 shs Nike Inc-CL B	11,766.	24,038.
300 shs Pepsico Inc.	20,881.	28,368.
250 shs Procter & Gamble Co	17,637.	22,773.
500 shs Sonoco Products Co.	17,134.	21,850.
200 shs Tesoro Logistics LP	10,718.	11,770.
100 shs Thermo Fisher Scientific Inc.	5,434.	12,529.
200 shs Wabtec Corp	12,961.	17,378.
250 shs Walt Disney Co	17,385.	23,548.
250 shs Western Gas Partners LP	13,114.	18,263.
200 shs 3M Company	15,221.	32,864.
550 shs Canadian National Railway	3,862.	37,901.
500 shs Nestle SA-Sponsored ADR	14,575.	36,708.
200 shs Novartis AG	11,199.	18,532.
750 shs Novo Nordisk A/S ADR	23,194.	31,740.
350 shs Novozymes A/S	1,484.	14,700.
1,500 shs Rogers Sugar Inc.	9,814.	6,104.
150 shs Siemens AG	13,296.	17,016.

600 shs Unilever PLC Sponsored ADR	18,884.	24,288.
200 shs Vermilion Energy Inc.	10,424.	9,802.
893 shs Snap On Inc	38,962.	122,109.
1,767,000 shs Abbvie Inc	96,529.	115,632.
2,215,000 shs Aerie Pharmaceuticals Inc	45,048.	64,656.
139 shs Avalanche Biotechnologies	2,363.	7,506.
1,530 shs Incyte Genomics	86,214.	111,858.
574 shs Medivation Inc.	47,118.	57,176.
2,544 shs T2 Biosystems, Inc	47,278.	48,947.
276 shs Adeptus Health Inc Class A	6,072.	10,332.
1,829 shs Briston Myers Squibb Co	92,870.	107,966.
2,000 shs Cardiovascular Sys Inc.	54,035.	60,160.
1,490 shs Celgene Corp	41,266.	166,671.
2,496 shs Gilead Sciences Inc	85,822.	235,273.
2,000 shs Insulet Corp	39,637.	92,120.
2,911 shs Disney (The Walt) Company	114,576.	274,187.
2,406 shs Del Friscos Restuarant Group	56,132.	57,023.
29 shs Zoe's Kitchen Inc	435.	867.
2,493 shs Facebook, Inc	154,937.	194,504.
705 shs Linkedin Corp	126,637.	161,946.
125 shs Google Inc- A	51,276.	66,333.
125 shs Google Inc- C	51,410.	65,800.
614 shs Netsuite Inc	47,144.	67,030.
2,428 shs Salesforce Com Inc.	120,833.	144,005.
1,846 shs Endurance International Group	25,634.	34,022.
1,671 shs Palo Alto Networks Inc	108,904.	204,814.
1,239 shs Taser Intl Inc	23,802.	32,809.
8,815 shs Wisdomtree Investments	125,252.	138,175.
771 shs Boeing Co.	89,120.	100,215.
681 shs Honeywell International	61,676.	68,046.
1,206 shs Akamai Technologies Inc	64,624.	75,930.
1,358 shs Apple Inc.	136,239.	149,896.
1,224 shs Intuit Inc.	76,151.	112,841.
5,731 shs Integrated Device Technology Inc	96,637.	112,328.
1,695 shs Quanta Services	39,918.	48,121.
914 shs EOG Resources Inc	96,238.	84,152.
377 shs Targa Resources Corp	8,294.	39,981.
1,812 shs Halliburton Co	112,206.	71,266.
8,085 shs JetBlue Airways Corp	89,588.	128,228.
590 shs Liberty Tax Inc	13,546.	21,087.
2,017 shs Marcus & Millichap Inc	24,204.	67,065.
667 shs Ultimate Software Group	89,609.	97,926.
2,388 shs Wageworks Inc.	21,492.	154,193.
99 shs Artisan Partners Asset Manag	2,970.	5,002.
1,142 shs CDW Corp DE	20,587.	40,164.
12 shs Cvent Inc	252.	334.
30 shs Keurig Green Mtn Inc	4,010.	3,972.
4,630 shs Sunedison Inc	97,846.	90,331.
356 shs Everest RE Group LTD	28,178.	60,627.
1,466 shs Fleetmatics Group PLC	43,326.	52,028.
1,823 shs Cyber-Ark Software LTD	66,001.	72,282.
674 shs NXP Semiconductors NV	47,907.	51,494.
1,477 shs Alibaba Group Holding	138,038.	153,519.
1,336 shs Roche Holdings LTD	48,298.	45,411.

1,620 shs Schlumberger LTD	148,146.	138,364.
Total to Form 990-PF, Part II, line 10b	4,317,965.	6,600,446.

Form 990-PF | Corporate Bonds | Statement 9

Description	Book Value	Fair Market Value
25,000 shs Oracle Corp Note 5% 7/8/19	25,261.	28,032.
25,000 shs Zimmer Holdings Note 4.625% 11/30/19	25,219.	27,309.
10,000 CA Inc Moody BAA2	10,278.	11,068.
Total to Form 990-PF, Part II, line 10c	60,758.	66,409.

Form 990-PF | Other Investments | Statement 10

Description	Valuation Method	Book Value	Fair Market Value
100,000 Koenigreich Norwegen Treasury Bonds	COST	19,036.	13,532.
Total to Form 990-PF, Part II, line 13		19,036.	13,532.

Supporting Schedules

2014 Tax Information Statement

Payer's Name and Address:
STATE STREET BANK & TRUST COMPANY
WMS TAX DEPARTMENT
PO BOX 5300
BOSTON, MA 02206-5300

Account Number:	4517652
Recipient's Tax ID Number:	XX-XXX6641
Payer's Federal ID Number:	20-8007203
Payer's State ID Number:	
State:	MA
Questions?	(844)221-1939

☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address:
THORACIC FOUNDATION
BRADLEY COOK,TAYLOR GANSON &
PERRIN
160 FEDERAL STREET
BOSTON, MA 02110

2014 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is proceeds less commissions and option premiums.
Covered (Box 5 is not checked)

Description of property *(Box 1a)*

Cusip Number	Date Sold or Disposed *(Box 1c)*	Date Acquired *(Box 1b)*	Form 8949 Checkbox	Proceeds *(Box 1d)*	Cost or Other Basis *(Box 1e)*	Code if any *(Box 1f)*	Adjustments *(Box 1g)*	Net Gain or Loss	Federal Income Tax Withheld *(Box 4)*	State Tax Withheld *(Box 16)*
Short Term Sales Reported on 1099-B										
607.0	3D SYSTEMS CORP									
88554D205	01/21/2014	12/10/2013	A	53,158.86	48,558.18		0.00	4,600.68	0.00	0.00
1340.0	AGNICO EAGLE MINES LTD									
008474108	02/26/2014	12/24/2013	A	44,065.26	35,237.31		0.00	8,827.95	0.00	0.00
780.0	AGNICO EAGLE MINES LTD									
008474108	02/27/2014	12/24/2013	A	25,726.76	20,511.27		0.00	5,215.49	0.00	0.00
2485.0	AGNICO EAGLE MINES LTD									
008474108	02/28/2014	Various	A	79,358.34	70,298.22		0.00	9,060.12	0.00	0.00
1671.0	AGNICO EAGLE MINES LTD									
008474108	10/23/2014	Various	A	47,962.65	49,757.04		0.00	-1,794.39	0.00	0.00
208.0	AMAZON COM INC COM									
023135106	10/17/2014	Various	A	63,602.93	67,080.64		0.00	-3,477.71	0.00	0.00
211.0	ANADARKO PETROLEUM CORP COM									
032511107	04/30/2014	01/22/2014	A	20,881.19	17,664.08		0.00	3,217.11	0.00	0.00
112.0	APPLE COMPUTER INC COM									
037833100	01/03/2014	10/21/2013	A	60,609.61	58,465.89		0.00	2,143.72	0.00	0.00

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Account Number: 4517652
Recipient's Tax ID Number: XX-XXX6641
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Payer's State ID Number:
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Questions? (844)221-1939

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160 FEDERAL STREET
BOSTON, MA 02110

2014 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

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Covered (Box 5 is not checked)

Description of property (Box 1a)

Cusip Number	Date Sold or Disposed (Box 1c)	Date Acquired (Box 1b)	Form 8949 Checkbox	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	Code if any (Box 1f)	Adjustments (Box 1g)	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 16)
127.0	APPLE COMPUTER INC COM									
037833100	02/20/2014	Various	A	67,250.50	68,063.52		0.00	-813.02	0.00	0.00
143.0	APPLE COMPUTER INC COM									
037833100	02/24/2014	Various	A	75,530.50	80,332.38	W	4,801.88	0.00	0.00	0.00
1988.0	APPLE COMPUTER INC COM									
037833100	09/25/2014	Various	A	196,422.77	158,207.27		0.00	38,215.50	0.00	0.00
481.0	ASTRONICS CORP									
046433108	06/30/2014	Various	A	27,168.63	23,641.04		0.00	3,527.59	0.00	0.00
996.0	ASTRONICS CORP									
046433108	06/30/2014	Various	A	56,257.50	48,661.99		0.00	7,595.51	0.00	0.00
4004.0	AUTOBYTEL INC									
05275N205	08/01/2014	Various	A	31,909.17	47,283.26		0.00	-15,374.09	0.00	0.00
466.0	B/E AEROSPACE INC									
073302101	06/30/2014	01/22/2014	A	42,718.48	40,414.74		0.00	2,303.74	0.00	0.00
534.0	B/E AEROSPACE INC									
073302101	07/23/2014	01/22/2014	A	49,227.78	46,312.16		0.00	2,915.62	0.00	0.00

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2014 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

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Description of property (Box 1a)										
1249.0	BARRACUDA NETWORKS INC									
068323104	06/16/2014	Various	A	36,758.50	50,974.39		0.00	-14,215.89	0.00	0.00
514.0	BARRETT BUSINESS SERVICES INC									
068463108	01/24/2014	Various	A	41,390.16	49,196.53		0.00	-7,806.37	0.00	0.00
439.0	BOEING CO COM									
097023105	06/30/2014	09/16/2013	A	55,821.87	50,744.05		0.00	5,077.82	0.00	0.00
280.0	BOFI HOLDING INC									
05566U108	03/19/2014	08/08/2013	A	26,032.14	18,207.56		0.00	7,824.58	0.00	0.00
140.0	BOFI HOLDING INC									
05566U108	03/20/2014	08/08/2013	A	13,052.58	9,103.78		0.00	3,948.80	0.00	0.00
80.0	BOFI HOLDING INC									
05566U108	03/21/2014	08/08/2013	A	7,201.11	5,202.16		0.00	1,998.95	0.00	0.00
188.0	BOFI HOLDING INC									
05566U108	05/14/2014	08/08/2013	A	14,553.23	12,225.08		0.00	2,328.15	0.00	0.00
31.0	BORDERFREE INC									
09970L100	06/16/2014	03/21/2014	A	486.43	496.00		0.00	-9.57	0.00	0.00

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2014 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

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949.0 BRISTOL MYERS SQUIBB CO COM										
110122108	06/16/2014	05/06/2014	A	44,527.89	48,451.76		0.00	-3,923.87	0.00	0.00
44.0 CASTLIGHT HEALTH INC-B										
14862Q100	07/31/2014	03/14/2014	A	593.99	704.00		0.00	-110.01	0.00	0.00
28.0 CBS OUTDOOR AMERICAS INC										
14987J106	05/06/2014	03/27/2014	A	826.12	784.00		0.00	42.12	0.00	0.00
1528.0 CHANNELADVISOR CORP										
159179100	02/11/2014	Various	A	60,172.35	41,933.24		0.00	18,239.11	0.00	0.00
44.0 COUPONS.COM INC										
22265J102	07/31/2014	03/07/2014	A	898.02	704.00		0.00	194.02	0.00	0.00
1864.0 CREE RESH INC COM										
225447101	09/10/2014	07/03/2014	A	79,239.30	98,688.92		0.00	-19,449.62	0.00	0.00
586.0 DEL FRISCOS RESTAURANT GROUP										
245077102	08/25/2014	12/13/2013	A	12,591.75	11,853.55		0.00	738.20	0.00	0.00
1154.0 ENDOCYTE INC										
29269A102	03/21/2014	Various	A	37,572.48	12,248.79		0.00	25,323.69	0.00	0.00

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2014 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

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Covered (Box 5 is not checked)

Description of property *(Box 1a)*

Cusip Number	Date Sold or Disposed *(Box 1c)*	Date Acquired *(Box 1b)*	Form 8949 Checkbox	Proceeds *(Box 1d)*	Cost or Other Basis *(Box 1e)*	Code if any *(Box 1f)*	Adjustments *(Box 1g)*	Net Gain or Loss	Federal Income Tax Withheld *(Box 4)*	State Tax Withheld *(Box 16)*
1632.0	ENDOCYTE INC									
29269A102	05/02/2014	Various	A	10,748.93	22,193.83		0.00	-11,444.90	0.00	0.00
2228.0	FIREEYE INC									
31816Q101	10/03/2014	Various	A	62,655.76	73,926.49		0.00	-11,270.73	0.00	0.00
3650.0	GENERAL ELECTRIC CO									
369604103	02/03/2014	10/21/2013	A	88,990.55	95,688.40		0.00	-6,697.85	0.00	0.00
1323.0	GREEN MOUNTIAN COFFE ROASTERS									
393122106	02/26/2014	12/11/2013	A	153,460.82	97,513.96		0.00	55,946.86	0.00	0.00
758.0	GSV CAPITAL CORP									
36191J101	01/24/2014	Various	A	9,790.39	9,496.47		0.00	293.92	0.00	0.00
761.0	GSV CAPITAL CORP									
36191J101	11/12/2014	07/30/2014	A	7,387.93	8,108.61		0.00	-720.68	0.00	0.00
430.0	GSV CAPITAL CORP									
36191J101	11/13/2014	07/30/2014	A	4,160.54	4,581.74		0.00	-421.20	0.00	0.00
785,0	GSV CAPITAL CORP									
36191J101	11/14/2014	07/30/2014	A	7,597.30	8,364.33		0.00	-767.03	0.00	0.00

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2014 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

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581.0	HALLIBURTON CO COM									
406216101	09/04/2014	03/28/2014	A	38,693.16	34,235.95		0.00	4,457.21	0.00	0.00
30.0	HORTONWORKS INC									
440894103	12/18/2014	12/12/2014	A	683.98	480.00		0.00	203.98	0.00	0.00
180.0	ICAD INC									
44934S206	05/07/2014	03/12/2014	A	1,321.35	1,980.00		0.00	-658.65	0.00	0.00
256.0	ICAD INC									
44934S206	05/08/2014	03/12/2014	A	1,785.33	2,816.00		0.00	-1,030.67	0.00	0.00
110.0	IRIDEX CORP									
462684101	01/24/2014	11/29/2013	A	997.90	1,103.30		0.00	-105.40	0.00	0.00
350.0	IRIDEX CORP									
462684101	01/27/2014	11/29/2013	A	3,209.44	3,510.50		0.00	-301.06	0.00	0.00
1163.0	IRIDEX CORP									
462684101	01/28/2014	Various	A	9,549.69	12,175.87		0.00	-2,626.18	0.00	0.00
797.0	IRIDEX CORP									
462684101	01/29/2014	Various	A	6,517.76	8,218.79		0.00	-1,701.03	0.00	0.00

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29.0	JUMEI INTERNATIONAL-ADR									
48138L107	10/23/2014	05/16/2014	A	654.11	638.00		0.00	16.11	0.00	0.00
30.0	KEURIG GREEN MTN INC									
49271M100	12/30/2014	08/22/2014	A	4,002.15	4,009.90		0.00	-7.75	0.00	0.00
430.0	LINKEDIN CORP-A									
53578A108	01/03/2014	Various	A	89,419.18	80,939.35		0.00	8,479.83	0.00	0.00
10.0	LINKEDIN CORP-A									
53578A108	01/06/2014	07/05/2013	A	2,051.40	1,885.30		0.00	166.10	0.00	0.00
2830.0	MICROSOFT CORP COM									
594918104	02/05/2014	09/27/2013	A	102,288.28	95,345.81		0.00	6,942.47	0.00	0.00
576.0	MOBILEIRON INC									
60739U204	08/21/2014	06/11/2014	A	4,870.03	5,184.00		0.00	-313.97	0.00	0.00
14.0	MOBILEYE NV									
N51488117	08/29/2014	08/01/2014	A	605.76	350.00		0.00	255.76	0.00	0.00
70.0	MOELIS & CO									
60786M105	10/22/2014	07/21/2014	A	2,106.39	2,283.53		0.00	-177.14	0.00	0.00

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2014 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

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690.0 MOELIS & CO										
60786M105	10/23/2014	Various	A	20,867.07	22,613.10		0.00	-1,746.03	0.00	0.00
179.0 MOELIS & CO										
60786M105	10/24/2014	07/22/2014	A	5,402.85	5,988.23		0.00	-585.38	0.00	0.00
240.0 MOELIS & CO										
60786M105	10/27/2014	Various	A	7,436.04	8,053.90		0.00	-617.86	0.00	0.00
140.0 MOELIS & CO										
60786M105	10/28/2014	Various	A	4,303.39	4,824.21		0.00	-520.82	0.00	0.00
149.0 MOELIS & CO										
60786M105	10/29/2014	07/24/2014	A	4,636.74	5,169.56		0.00	-532.82	0.00	0.00
1801.0 NATURAL GROCERS BY VITAMIN C										
63888U108	06/16/2014	Various	A	41,000.84	62,993.95		0.00	-21,993.11	0.00	0.00
30.0 NEFF CORP-CLASS A										
640094207	12/26/2014	11/20/2014	A	317.03	450.00		0.00	-132.97	0.00	0.00
370.0 NOVADAQ TECHNOLOGIES INC										
66987G102	09/29/2014	10/24/2013	A	4,628.04	6,197.50		0.00	-1,569.46	0.00	0.00

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29.0	OPOWER INC									
68375Y109	06/16/2014	04/03/2014	A	538.01	551.00		0.00	-12.99	0.00	0.00
156.0	POWER SOLUTIONS INTERNATIONA									
73933G202	01/24/2014	Various	A	9,699.28	6,006.95		0.00	3,692.32	0.00	0.00
39.0	POWER SOLUTIONS INTERNATIONA									
73933G202	01/27/2014	07/11/2013	A	2,299.99	1,638.47		0.00	661.52	0.00	0.00
485.0	PUMA BIOTECHNOLOGY INC									
74587V107	02/28/2014	11/26/2013	A	56,508.25	24,067.45		0.00	32,440.80	0.00	0.00
740.0	RICE ENERGY INC									
762760106	07/23/2014	Various	A	18,712.92	23,665.32		0.00	-4,952.40	0.00	0.00
80.0	ROCKWELL MEDICAL TECH INC									
774374102	08/20/2014	10/15/2013	A	815.09	876.88		0.00	-61.79	0.00	0.00
619.0	ROCKWELL MEDICAL TECH INC									
774374102	08/21/2014	10/15/2013	A	6,041.67	6,784.86		0.00	-743.19	0.00	0.00
791.0	ROCKWELL MEDICAL TECH INC									
774374102	08/22/2014	10/15/2013	A	7,699.97	8,670.15		0.00	-970.18	0.00	0.00

2014 Tax Information Statement

Payer's Name and Address:
STATE STREET BANK & TRUST COMPANY
WMS TAX DEPARTMENT
PO BOX 5300
BOSTON, MA 02206-5300

Account Number: 4517652
Recipient's Tax ID Number: XX-XXX6641
Payer's Federal ID Number: 20-8007203
Payer's State ID Number:
State: MA
Questions? (844)221-1939

☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address:
THORACIC FOUNDATION
BRADLEY COOK,TAYLOR GANSON &
PERRIN
160 FEDERAL STREET
BOSTON, MA 02110

2014 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is proceeds less commissions and option premiums.
Covered (Box 5 is not checked)

Description of property (Box 1a) / Cusip Number	Date Sold or Disposed (Box 1c)	Date Acquired (Box 1b)	Form 8949 Checkbox	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	Code if any (Box 1f)	Adjustments (Box 1g)	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 16)
310.0 ROCKWELL MEDICAL TECH INC										
774374102	08/25/2014	10/15/2013	A	2,862.78	3,397.91		0.00	-535.13	0.00	0.00
1213.0 ROCKWELL MEDICAL TECH INC										
774374102	08/25/2014	Various	A	11,384.47	14,597.99		0.00	-3,213.52	0.00	0.00
1387.0 ROCKWELL MEDICAL TECH INC										
774374102	08/26/2014	11/12/2013	A	12,913.65	17,365.80		0.00	-4,452.15	0.00	0.00
1386.0 ROCKWELL MEDICAL TECH INC										
774374102	08/27/2014	Various	A	13,018.28	18,836.55		0.00	-5,818.27	0.00	0.00
229.0 ROCKWELL MEDICAL TECH INC										
774374102	08/28/2014	02/13/2014	A	2,126.33	2,857.23		0.00	-730.90	0.00	0.00
29.0 RUBICON PROJECT INC/THE										
78112V102	05/07/2014	04/01/2014	A	347.12	435.00		0.00	-87.88	0.00	0.00
60.0 SILVER SPRING NETWORKS INC										
82817Q103	01/17/2014	10/29/2013	A	1,076.50	1,102.63		0.00	-26.13	0.00	0.00
18.0 SILVER SPRING NETWORKS INC										
82817Q103	01/21/2014	10/29/2013	A	313.43	330.79		0.00	-17.36	0.00	0.00

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2014 Tax Information Statement

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WMS TAX DEPARTMENT
PO BOX 5300
BOSTON, MA 02206-5300

Account Number: 4517652
Recipient's Tax ID Number: XX-XXX6641
Payer's Federal ID Number: 20-8007203
Payer's State ID Number:
State: MA
Questions? (844)221-1939

☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address:
THORACIC FOUNDATION
BRADLEY COOK,TAYLOR GANSON &
PERRIN
160 FEDERAL STREET
BOSTON, MA 02110

2014 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is proceeds less commissions and option premiums.
Covered (Box 5 is not checked)

Description of property *(Box 1a)*

Cusip Number	Date Sold or Disposed *(Box 1c)*	Date Acquired *(Box 1b)*	Form 8949 Checkbox	Proceeds *(Box 1d)*	Cost or Other Basis *(Box 1e)*	Code if any *(Box 1f)*	Adjustments *(Box 1g)*	Net Gain or Loss	Federal Income Tax Withheld *(Box 4)*	State Tax Withheld *(Box 16)*
1340.0	SILVER SPRING NETWORKS INC									
82817Q103	01/24/2014	Various	A	21,317.41	24,969.61		0.00	-3,652.20	0.00	0.00
550.0	SILVER SPRING NETWORKS INC									
82817Q103	01/30/2014	10/31/2013	A	8,803.64	12,081.24		0.00	-3,277.60	0.00	0.00
234.0	SILVER SPRING NETWORKS INC									
82817Q103	01/31/2014	10/31/2013	A	3,809.26	5,140.02		0.00	-1,330.76	0.00	0.00
1377.0	STARBUCKS CORP COM									
855244109	02/26/2014	04/23/2013	A	98,617.78	81,855.21		0.00	16,762.57	0.00	0.00
405.0	STRATASYS LTD									
M85548101	02/05/2014	Various	A	42,671.75	53,337.62		0.00	-10,665.87	0.00	0.00
3167.0	SUNESIS PHARMACEUTICALS INC									
867328601	10/10/2014	Various	A	3,372.78	23,760.87		0.00	-20,388.09	0.00	0.00
1990.0	TEARLAB CORP									
878193101	01/29/2014	Various	A	12,957.66	13,920.47	W	962.81	0.00	0.00	0.00
394.0	TEARLAB CORP									
878193101	01/30/2014	04/08/2013	A	2,553.70	2,752.21	W	198.51	0.00	0.00	0.00

2014 Tax Information Statement

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Account Number:	**4517652**
Recipient's Tax ID Number:	**XX-XXX6641**
Payer's Federal ID Number:	**20-8007203**
Payer's State ID Number:	
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Questions?	**(844)221-1939**

☐ **Corrected** ☐ **2nd TIN notice**

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BRADLEY COOK,TAYLOR GANSON &
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160 FEDERAL STREET
BOSTON, MA 02110

2014 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is proceeds less commissions and option premiums.
Covered (Box 5 is not checked)

Description of property (Box 1a)

Cusip Number	Date Sold or Disposed (Box 1c)	Date Acquired (Box 1b)	Form 8949 Checkbox	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	Code if any (Box 1f)	Adjustments (Box 1g)	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 16)
494.0	TEARLAB CORP									
878193101	08/21/2014	02/19/2014	A	1,871.33	3,690.38		0.00	-1,819.05	0.00	0.00
28.0	TERRAFORM PWR INC-A									
88104R100	07/31/2014	07/18/2014	A	864.50	700.00		0.00	164.50	0.00	0.00
837.0	TEXTURA CORP									
883211104	10/10/2014	09/16/2014	A	17,913.16	24,135.48		0.00	-6,222.32	0.00	0.00
1114.0	TRUECAR INC									
89785L107	08/08/2014	Various	A	15,187.38	11,258.15		0.00	3,929.23	0.00	0.00
539.0	UNITED TECHNOLOGIES CORP									
913017109	07/24/2014	01/27/2014	A	58,842.88	61,602.15		0.00	-2,759.27	0.00	0.00
40.0	VINCE HOLDING CORP									
92719W108	07/31/2014	11/22/2013	A	1,349.57	800.00		0.00	549.57	0.00	0.00
975.0	VMWARE INC CL A									
928563402	06/20/2014	12/20/2013	A	90,834.65	88,137.17		0.00	2,697.48	0.00	0.00
303.0	VMWARE INC CL A									
928563402	06/23/2014	Various	A	28,431.44	28,237.12		0.00	194.32	0.00	0.00

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2014 Tax Information Statement

Payer's Name and Address:
STATE STREET BANK & TRUST COMPANY
WMS TAX DEPARTMENT
PO BOX 5300
BOSTON, MA 02206-5300

Account Number:	**4517652**
Recipient's Tax ID Number:	**XX-XXX6641**
Payer's Federal ID Number:	**20-8007203**
Payer's State ID Number:	
State:	**MA**
Questions?	**(844)221-1939**

☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address:
THORACIC FOUNDATION
BRADLEY COOK,TAYLOR GANSON &
PERRIN
160 FEDERAL STREET
BOSTON, MA 02110

2014 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is proceeds less commissions and option premiums.
Covered (Box 5 is not checked)

Description of property *(Box 1a)*

Cusip Number	Date Sold or Disposed *(Box 1c)*	Date Acquired *(Box 1b)*	Form 8949 Checkbox	Proceeds *(Box 1d)*	Cost or Other Basis *(Box 1e)*	Code if any *(Box 1f)*	Adjustments *(Box 1g)*	Net Gain or Loss	Federal Income Tax Withheld *(Box 4)*	State Tax Withheld *(Box 16)*
1984.0	WISDOMTREE INVESTMENTS INC									
97717P104	03/19/2014	10/15/2013	A	26,497.32	24,534.74		0.00	1,962.58	0.00	0.00
865.0	YAHOO INC COM									
984332106	06/17/2014	11/14/2013	A	29,722.21	30,477.76		0.00	-755.55	0.00	0.00
3635.0	YAHOO INC COM									
984332106	07/16/2014	Various	A	124,080.16	135,273.04		0.00	-11,192.88	0.00	0.00
424.0	YELP INC									
985817105	09/25/2014	05/08/2014	A	30,259.87	23,498.08		0.00	6,761.79	0.00	0.00
Total Short Term Sales Reported on 1099-B				**2,842,025.17**	**2,764,673.68**		**5,963.20**	**83,314.68**	**0.00**	**0.00**

Report on Form 8949, Part I, with Box A checked

Long Term Sales Reported on 1099-B

164.0	AMAZON COM INC COM									
023135106	10/16/2014	06/05/2013	D	49,801.48	43,950.25		0.00	5,851.23	0.00	0.00
151.0	AMAZON COM INC COM									
023135106	10/17/2014	06/05/2013	D	46,173.28	40,466.38		0.00	5,706.90	0.00	0.00
397.0	ANADARKO PETROLEUM CORP COM									
032511107	04/30/2014	04/13/2013	D	39,288.31	36,105.27		0.00	3,183.04	0.00	0.00

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2014 Tax Information Statement

Payer's Name and Address:
STATE STREET BANK & TRUST COMPANY
WMS TAX DEPARTMENT
PO BOX 5300
BOSTON, MA 02206-5300

Account Number: 4517652
Recipient's Tax ID Number: XX-XXX6641
Payer's Federal ID Number: 20-8007203
Payer's State ID Number:
State: MA
Questions? (844)221-1939

☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address:
THORACIC FOUNDATION
BRADLEY COOK,TAYLOR GANSON &
PERRIN
160 FEDERAL STREET
BOSTON, MA 02110

2014 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is proceeds less commissions and option premiums.
Covered (Box 5 is not checked)

Description of property *(Box 1a)*

Cusip Number	Date Sold or Disposed *(Box 1c)*	Date Acquired *(Box 1b)*	Form 8949 Checkbox	Proceeds *(Box 1d)*	Cost or Other Basis *(Box 1e)*	Code if any *(Box 1f)*	Adjustments *(Box 1g)*	Net Gain or Loss	Federal Income Tax Withheld *(Box 4)*	State Tax Withheld *(Box 16)*
6872.0	CRAWFORD & CO-B									
224633107	05/29/2014	Various	D	67,295.32	38,420.10		0.00	28,875.22	0.00	0.00
655.0	DEL FRISCOS RESTAURANT GROUP									
245077102	08/22/2014	Various	D	14,132.88	14,048.05		0.00	84.83	0.00	0.00
356.0	DEL FRISCOS RESTAURANT GROUP									
245077102	08/25/2014	07/26/2013	D	7,649.59	7,681.23		0.00	-31.64	0.00	0.00
23.0	GOOGLE INC-A									
38259P508	01/27/2014	Various	D	25,261.49	14,417.58		0.00	10,843.91	0.00	0.00
210.0	GSV CAPITAL CORP									
36191J101	11/10/2014	Various	D	2,042.98	2,874.08		0.00	-831.10	0.00	0.00
1261.0	GSV CAPITAL CORP									
36191J101	11/11/2014	09/13/2013	D	12,093.98	17,616.29		0.00	-5,522.31	0.00	0.00
1469.0	GSV CAPITAL CORP									
36191J101	11/12/2014	09/13/2013	D	14,261.32	20,522.08		0.00	-6,260.76	0.00	0.00
666.0	HEALTHSTREAM INC									
42222N103	08/20/2014	07/23/2013	D	17,301.22	21,592.45		0.00	-4,291.23	0.00	0.00

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BOSTON, MA 02206-5300

Account Number: 4517652
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160 FEDERAL STREET
BOSTON, MA 02110

2014 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

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Covered (Box 5 is not checked)

Description of property (Box 1a)

Cusip Number	Date Sold or Disposed (Box 1c)	Date Acquired (Box 1b)	Form 8949 Checkbox	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	Code if any (Box 1f)	Adjustments (Box 1g)	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 16)
760.0	NOVADAQ TECHNOLOGIES INC									
66987G102	08/27/2014	04/19/2013	D	9,912.99	9,686.65		0.00	226.34	0.00	0.00
535.0	NOVADAQ TECHNOLOGIES INC									
66987G102	08/28/2014	04/19/2013	D	6,875.55	6,818.90		0.00	56.65	0.00	0.00
710.0	NOVADAQ TECHNOLOGIES INC									
66987G102	09/26/2014	Various	D	8,867.56	9,115.15		0.00	-247.59	0.00	0.00
231.0	NOVADAQ TECHNOLOGIES INC									
66987G102	09/29/2014	05/02/2013	D	2,889.40	2,979.90		0.00	-90.50	0.00	0.00
7677.0	OREXIGEN THERAPEUTICS INC									
686164104	04/04/2014	Various	D	44,659.18	48,218.86		0.00	-3,559.68	0.00	0.00
164.0	SCHLUMBERGER LTD									
806857108	09/04/2014	07/19/2013	D	17,288.00	13,432.52		0.00	3,855.48	0.00	0.00
3600.0	STAAR SURGICAL CO									
852312305	07/01/2014	Various	D	48,023.29	30,407.66		0.00	17,615.63	0.00	0.00
1400.0	STAAR SURGICAL CO									
852312305	07/02/2014	05/13/2013	D	19,799.48	13,062.00		0.00	6,737.48	0.00	0.00

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2014 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

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Covered (Box 5 is not checked)

Description of property (Box 1a) / Cusip Number	Date Sold or Disposed (Box 1c)	Date Acquired (Box 1b)	Form 8949 Checkbox	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	Code if any (Box 1f)	Adjustments (Box 1g)	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 16)
4585.0 TEARLAB CORP										
878193101	08/08/2014	Various	D	17,424.90	34,004.50		0.00	-16,579.60	0.00	0.00
1277.0 TEARLAB CORP										
878193101	08/20/2014	Various	D	4,811.37	10,270.76		0.00	-5,459.39	0.00	0.00
167.0 TEARLAB CORP										
878193101	08/21/2014	Various	D	632.61	1,874.52		0.00	-1,241.91	0.00	0.00
1649.0 WEB.COM GROUP INC										
94733A104	06/24/2014	Various	D	44,773.47	24,850.72		0.00	19,922.75	0.00	0.00
Total Long Term Sales Reported on 1099-B				**521,259.65**	**462,415.90**		**0.00**	**58,843.75**	**0.00**	**0.00**

Report on Form 8949, Part II, with Box D checked

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2014 Tax Information Statement

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BOSTON, MA 02206-5300

2014 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is proceeds less commissions and option premiums.
For noncovered securities (Box 5 is checked) shown on this statement, cost basis information is not being reported to the IRS.
Cost or Other Basis amounts shown with a "U" are unknown or unsubstantiated.

Description of property *(Box 1a)*

CUSIP Number	Date Sold or Disposed *(Box 1c)*	Date Acquired *(Box 1b)*	Form 8949 Checkbox	Proceeds *(Box 1d)*	Cost or Other Basis *(Box 1e)*	Code if any *(Box 1f)*	Adjustments *(Box 1g)*	Net Gain or Loss	Federal Income Tax Withheld *(Box 4)*	State Tax Withheld *(Box 16)*
Long Term Sales Reported on 1099-B										
27.0	GOOGLE INC-A									
38259P508	01/03/2014	05/24/2010	E	29,867.50	13,159.52		0.00	16,707.98	0.00	0.00
21.0	GOOGLE INC-A									
38259P508	01/27/2014	05/24/2010	E	23,064.84	10,235.18		0.00	12,829.66	0.00	0.00
2527.0	IXIA									
45071R109	07/07/2014	Various	E	28,637.08	23,408.30		0.00	5,228.78	0.00	0.00
Total Long Term Sales Reported on 1099-B				**81,569.42**	**46,803.00**		**0.00**	**34,766.42**	**0.00**	**0.00**

Report on Form 8949, Part II, with Box E checked

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RBC

1099-B RBC Capital Markets, LLC - Sales, Redemptions, and Returns of Principal

Please note that items that are checked in the 'Non-Cvrd. Sec' column are noncovered securities and cost basis information for these items is not reported to the IRS. Cost basis information for items that are checked in the 'Basis Rptd' To IRS' column is reported to the IRS. Please see enclosed insert for additional information.

BOXES 1a, 1b, 1c, 1d, 1e, 1f, 1g, 2, 3, 5 – Stocks, bonds etc.

SECURITY ID & DESCRIPTION (Box 1a)

DATE OF SALE (Box 1c)	FORM 8949 / NOTES	QUANTITY (Box 1a)	NET PROCEEDS (Box 1d)	DATE ACQUIRED (Box 1b)	NET COST (Box 1e)	ADJUSTMENTS / CODE IF ANY (Box 1g / Box 1f)	TERM (Box 2)	BASIS RPTD TO IRS (Box 3)	NON-CVRD SEC (Box 5)
000375204 ABB ABB LTD SPONSORED ADR									
05/20/14	E/	700.000	16,301.47	VARIOUS	16,358.20		LONG	☐	☑
075887109 BDX BECTON DICKINSON & CO									
02/03/14	E/	150.000	15,611.52	2/22/2008	13,584.50		LONG	☐	☑
136375102 CNI CANADIAN NATIONAL RAILWAY CO									
10/21/14	E/	50.000	3,211.92	6/12/2001	351.11		LONG	☐	☑
291011104 EMR EMERSON ELECTRIC CO									
07/25/14	E/	150.000	9,941.19	7/20/2009	5,251.90		LONG	☐	☑
K7317J133 NVZMF NOVOZYMES A/S US LISTED									
07/25/14	E/	200.000	9,845.77	11/26/2003	847.73		LONG	☐	☑
777779307 ROSE ROSETTA RESOURCES INC									
02/03/14	E/	200.000	7,953.38	10/25/2010	4,930.47		LONG	☐	☑
780249108 RDSMY ROYAL DSM NV SPONSORED ADR									
10/21/14	D/	600.000	8,642.80	1/28/2011	9,236.00		LONG	☑	☐

CIC FOUNDATION
R COOK GALEN STONE AND
01/01/1950
0
FEDERAL ST
BOSTON MA 02110-1700

RBC

1099-B (con't) RBC Capital Markets, LLC - Sales, Redemptions, and Returns of Principal

BOXES 1a, 1b, 1c, 1d, 1e, 1f, 1g, 2, 3, 5 – Stocks, bonds etc. (con't)

SECURITY ID & DESCRIPTION (Box 1a)

DATE OF SALE (Box 1c)	FORM 8949 / NOTES	QUANTITY (Box 1a)	NET PROCEEDS (Box 1d)	DATE ACQUIRED (Box 1b)	NET COST (Box 1e)	ADJUSTMENTS / CODE IF ANY (Box 1g / Box 1f)	TERM (Box 2)	BASIS RPTD TO IRS (Box 3)	NON-CVRD SEC (Box 5)
833635105 SQM SOCIEDAD QUIMICA MINERA DE CHILE S A SPONSORED ADR REPSTG SER B									
02/03/14	D/	100.000	2,364.95	6/8/2011	6,187.60		LONG	☑	☐

	NET PROCEEDS	NET COST	ADJUSTMENTS	TERM	BASIS RPTD TO IRS	NON-CVRD SEC
Boxes 1d, 1e & 1g SUBTOTALS	**$0.00**	**$0.00**	**$0.00**	UNKNOWN	☐	☑
	$0.00	**$0.00**	**$0.00**	SHORT	☐	☑
	$62,865.24	**$41,323.91**	**$0.00**	LONG	☐	☑
	$0.00	**$0.00**	**$0.00**	SHORT	☑	☐
	$11,007.75	**$15,423.60**	**$0.00**	LONG	☑	☐
Boxes 1d, 1e & 1g TOTAL	**$73,872.99**	**$56,747.51***	**$0.00**			

* Please note that box 1e of Form 1099-B (shown in summary on the first page of this document) reflects the net cost or other basis of covered securities you sold (sale transactions checkmarked in the "BASIS RPTD TO IRS" column). It does not reflect the net cost or other basis of noncovered securities (sale transactions checkmarked in the "NON-CVRD SEC" column), which is not reported to the IRS. Please see the enclosed insert for more information.

Schedule of Realized Gains and Losses

This section includes a summary of the short-term or long-term gain or loss from the sale of selected securities in this account. "Short-term" refers to securities held for one year or less; "long-term" refers to securities held more than one year. RBC provides the following Schedule of Realized Gains and Losses as a service to its clients; the information may not be accurate for tax reporting or other purposes and may rely on information, such as the original cost basis for a security, that you or another source at your direction provided to RBC.

Market discount, acquisition premium and life to date OID are only provided for covered securities. Cost basis information may reflect a change in the value of certain fixed income and other securities that return or amortize principal over time. In the case of bonds purchased at a premium, cost basis information may be amortized. In addition, cost basis information may reflect accretion for zero coupon and OID bonds. Please refer to IRS Publications 1212 and 550 or consult your tax advisor for additional information.

For more information on original cost and other tax attributes reported on fixed income securities, please see the enclosed insert.

Please see Form 1099-B for information reported to the IRS.

Long-Term

QUANTITY	DESCRIPTION	NON-COVERED	OPEN DATE	CLOSE DATE	NET PROCEEDS	NET COST	REALIZED GAIN/LOSS
300.000	ABB LTD SPONSORED ADR SYMBOL: ABB, CUSIP: 000375204	☑	05/21/08	05/20/14	6,986.34	9,908.00	-2,921.66
200.000	ABB LTD SPONSORED ADR SYMBOL: ABB, CUSIP: 000375204	☑	07/20/09	05/20/14	4,657.56	3,420.20	1,237.36
200.000	ABB LTD SPONSORED ADR SYMBOL: ABB, CUSIP: 000375204	☑	02/09/09	05/20/14	4,657.56	3,030.00	1,627.56
150.000	BECTON DICKINSON & CO SYMBOL: BDX, CUSIP: 075887109	☑	02/22/08	02/03/14	15,611.52	13,584.50	2,027.02
50.000	CANADIAN NATIONAL RAILWAY CO SYMBOL: CNI, CUSIP: 136375102	☑	06/12/01	10/21/14	3,211.92	351.11	2,860.81
150.000	EMERSON ELECTRIC CO SYMBOL: EMR, CUSIP: 291011104	☑	07/20/09	07/25/14	9,941.19	5,251.90	4,689.29
200.000	NOVOZYMES A/S US LISTED SYMBOL: NVZMF, CUSIP: K7317J133	☑	11/26/03	07/25/14	9,845.77	847.73	8,998.04
200.000	ROSETTA RESOURCES INC SYMBOL: ROSE, CUSIP: 777779307	☑	10/25/10	02/03/14	7,953.38	4,930.47	3,022.91
600.000	ROYAL DSM NV SPONSORED ADR SYMBOL: RDSMY, CUSIP: 780249108	☐	01/28/11	10/21/14	8,642.80	9,236.00	-593.20
100.000	SOCIEDAD QUIMICA MINERA DE CHILE S A SPONSORED ADR REPSTG	☐	06/08/11	02/03/14	2,364.95	6,187.60	-3,822.65

THORACIC FOUNDATION
BRADLEY R COOK GALEN STONE AND
U/A DTD 01/01/1950
STE 20
160 FEDERAL ST
BOSTON MA 02110-1700

RBC

Schedule of Realized Gains and Losses (con't)

Long-Term (con't)

QUANTITY	DESCRIPTION	NON-COVERED	OPEN DATE	CLOSE DATE	NET PROCEEDS	NET COST	REALIZED GAIN/LOSS
	SER B SYMBOL: SQM, CUSIP: 833635105						
	Long-Term Subtotal				**73,872.99**		**17,125.48**
Total Gains and Losses					**73,872.99**		**17,125.48**
	Short-Term						**0.00**
	Long-Term						**17,125.48**
	Term Unknown						**0.00**

Form **8868** (Rev. January 2011) 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.

OMB No. 1545-1709

- If you are filing for an **Automatic 3-Month Extension, complete only Part I** and check this box . . . . ▶ ☑
- 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	Employer identification number
File by the due date for filing your return. See instructions.	The Thoracic Foundation	04-2226641
	Number, street, and room or suite no. If a P.O. box, see instructions. c/o Taylor, Ganson & Perrin, LLP, 160 Federal Street, 20th Floor	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. Boston, MA 02110	

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	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	03	Form 4720	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

- The books are in the care of ▶ Taylor, Ganson & Perrin, LLP, 160 Federal Street, 20th Floor, Boston, MA 02110

Telephone No. ▶ 617-951-2777 FAX No. ▶ 617-951-0989

- 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 August 15 , 20 15 , to file the exempt organization return for the organization named above. The extension is for the organization's return for:

▶ ☑ calendar year 20 14 or

▶ ☐ tax year beginning ________ , 20 ____ , and ending ________ , 20 ____ .

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 Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	$ 16,000
b	If this application is for Form 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	$ 16,000
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 fund withdrawal 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).

Type or print	Name of exempt organization	**Employer identification number**
File by the extended due date for filing your return. See instructions.	Number, street, and room or suite no. If a P.O. box, see instructions.	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	

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

Application Is For	**Return Code**	**Application Is For**	**Return Code**
Form 990	01		
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	03	Form 4720	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.

• The books are in the care of ▶

Telephone No. ▶ 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 ______, 20 ___.

5 For calendar year ___, or other tax year beginning ______, 20 ___, and ending ______, 20 ___.

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

8a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	$
b	If this application is for Form 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	$
c	**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	$

Signature and Verification

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 ▶ Edward R. Martin Title ▶ Attorney Date ▶ 5/12/15