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 instructions is at *www.irs.gov/form990pf*.

OMB No 1545-0052

2014

Open to Public Inspection

For calendar year 2014, or tax year beginning 01-01-2014 , and ending 12-31-2014

Name of foundation
THE EVANS FAMILY FOUNDATION

A Employer identification number
04-3523698

Number and street (or P O box number if mail is not delivered to street address) 31 ST JAMES AVE NO 740 | Room/suite

B Telephone number (see instructions)
(617) 933-3620

City or town, state or province, country, and ZIP or foreign postal code
BOSTON, MA 02116

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)*▶$ 2,150,302

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) (see instructions))*

		(a) Revenue and expenses per books	**(b)** Net investment income	**(c)** Adjusted net income	**(d)** Disbursements for charitable purposes (cash basis only)
Revenue 1	Contributions, gifts, grants, etc , received (attach schedule)	1,000,000			
2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	25,130	25,130		
5a	Gross rents				
b	Net rental income or (loss) ____				
6a	Net gain or (loss) from sale of assets not on line 10	189,887			
b	Gross sales price for all assets on line 6a 2,037,003				
7	Capital gain net income (from Part IV, line 2)		216,766		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less Cost of goods sold				
c	Gross profit or (loss) (attach schedule)				
11	Other income (attach schedule)				
12	**Total.** Add lines 1 through 11	1,215,017	241,896		
Operating and Administrative Expenses 13	Compensation of officers, directors, trustees, etc	0	0		0
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule)				
b	Accounting fees (attach schedule)				
c	Other professional fees (attach schedule)	10,495	10,495		0
17	Interest				
18	Taxes (attach schedule) (see instructions)	15,250	250		0
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses (attach schedule)	10,449	10,449		0
24	**Total operating and administrative expenses.** Add lines 13 through 23	36,194	21,194		0
25	Contributions, gifts, grants paid	1,630,000			1,630,000
26	**Total expenses and disbursements.** Add lines 24 and 25	1,666,194	21,194		1,630,000
27	Subtract line 26 from line 12				
a	**Excess of revenue over expenses and disbursements**	-451,177			
b	**Net investment income** (if negative, enter -0-)		220,702		
c	**Adjusted net income** (if negative, enter -0-)				

Part II Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	537,105	1,391,855	1,391,855
	2 Savings and temporary cash investments	50,333	19,948	20,216
	3 Accounts receivable ▶			
	Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶			
	Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U S and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)			
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)			
	14 Land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
	15 Other assets (describe ▶)	1,978,470	702,928	738,231
	16 **Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	2,565,908	2,114,731	2,150,302
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 (attach schedule)			
	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** ▶ ☐ **and complete lines 24 through 26 and lines 30 and 31.**			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☑ **and complete lines 27 through 31.**			
	27 Capital stock, trust principal, or current funds	0	0	
	28 Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29 Retained earnings, accumulated income, endowment, or other funds	2,565,908	2,114,731	
	30 **Total net assets or fund balances** (see instructions)	2,565,908	2,114,731	
	31 **Total liabilities and net assets/fund balances** (see instructions)	2,565,908	2,114,731	

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	2,565,908
2	Enter amount from Part I, line 27a	2	-451,177
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	2,114,731
5	Decreases not included in line 2 (itemize) ▶	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	2,114,731

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	See Additional Data Table			
b				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	See Additional Data Table			
b				
c				
d				
e				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a	See Additional Data Table			
b				
c				
d				
e				

2	Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	216,766
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☑ No

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

1 Enter the appropriate amount in each column for each year, see 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	1,489,766	3,023,179	0 492781
2012	1,785,772	3,242,389	0 550758
2011	1,244,579	3,290,162	0 378273
2010	1,415,879	4,219,907	0 335524
2009	904,741	4,137,631	0 218662

2	**Total** of line 1, column (d).	2	1 975998
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 395200
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	1,973,912
5	Multiply line 4 by line 3.	5	780,090
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	2,207
7	Add lines 5 and 6.	7	782,297
8	Enter qualifying distributions from Part XII, line 4.	8	1,630,000

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 page 18 of the 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	2,207
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)				
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			2	0
3	Add lines 1 and 2			3	2,207
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			4	0
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-			5	2,207
6	Credits/Payments				
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a	19,054		
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	19,054
8	Enter any **penalty** for underpayment of estimated tax Check here ☑ if Form 2220 is attached			8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	16,847
11	Enter the amount of line 10 to be **Credited to 2015 estimated tax** ▶ 16,847 **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		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?	1b		No
	*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		No
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		No
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		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	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		No
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	Yes	
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	Yes	
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	Yes	
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		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10	Yes	

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶N/A

14 The books are in care of ▶JACQUELINE MCCOY Telephone no ▶(617) 933-3620

Located at ▶31 ST JAMES AVENUE SUITE 740 BOSTON MA ZIP+4 ▶02116

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 |

			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		No
	See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶			

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

			Yes	No
	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 ☑ 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)?	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		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 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 ▶ 20____ , 20____ , 20____ , 20____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions)	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20____ , 20____ , 20____ , 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ 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.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?	4b		No

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ 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)? **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? ☐ 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** No

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

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☑ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? **7b**

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
BRUCE EVANS 31 ST JAMES AVE SUITE 740 BOSTON, MA 02116	TRUSTEE 0 00	0	0	0
BRIDGITT EVANS 31 ST JAMES AVE SUITE 740 BOSTON, MA 02116	TRUSTEE 0 00	0	0	0

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

(a) Name and address of each employee paid more than $50,000	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
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 (see instructions). 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	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
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	1,388,078
b	Average of monthly cash balances			1b	615,894
c	Fair market value of all other assets (see instructions)			1c	0
d	**Total** (add lines 1a, b, and c)			1d	2,003,972
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	2,003,972
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)			4	30,060
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4			5	1,973,912
6	**Minimum investment return.** Enter 5% of line 5			6	98,696

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	98,696
2a	Tax on investment income for 2014 from Part VI, line 5	2a	2,207		
b	Income tax for 2014 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	2,207
3	Distributable amount before adjustments Subtract line 2c from line 1			3	96,489
4	Recoveries of amounts treated as qualifying distributions			4	0
5	Add lines 3 and 4			5	96,489
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	96,489

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	1,630,000
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	1,630,000
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions)	5	2,207
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	1,627,793

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					96,489
2 Undistributed income, if any, as of the end of 2014					
a Enter amount for 2013 only.				0	
b Total for prior years 20___ , 20___ , 20___			0		
3 Excess distributions carryover, if any, to 2014					
a From 2009.	703,341				
b From 2010.	1,212,798				
c From 2011.	1,082,937				
d From 2012.	1,624,109				
e From 2013.	1,344,075				
f **Total** of lines 3a through e.		5,967,260			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ $ 1,630,000					
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.					96,489
e Remaining amount distributed out of corpus		1,533,511			
5 Excess distributions carryover applied to 2014 *(If an amount appears in column (d), the same amount must be shown in column (a).)*		0			0
6 **Enter the net total of each column as indicated below:**					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		7,500,771			
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 instructions				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 (see instructions) . . .		703,341			
9 **Excess distributions carryover to 2015.** Subtract lines 7 and 8 from line 6a		6,797,430			
10 Analysis of line 9					
a Excess from 2010. . . .	1,212,798				
b Excess from 2011. . . .	1,082,937				
c Excess from 2012. . . .	1,624,109				
d Excess from 2013. . . .	1,344,075				
e Excess from 2014. . . .	1,533,511				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2014, enter the date of the ruling. . . . . . . ▶

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

	Tax year	Prior 3 years			(e) Total
	(a) 2014	**(b)** 2013	**(c)** 2012	**(d)** 2011	
2a 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 organization had $5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000) (See section 507(d)(2))

BRUCE EVANS

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ▶ ☑ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds If the foundation makes gifts, grants, etc (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number or email address of the person to whom applications should be addressed

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

c Any submission deadlines

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

Part XV Supplementary Information (continued)

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

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* See Additional Data Table				
Total . . . . ▶ 3a				1,630,000
b *Approved for future payment*				
Total . . . . ▶ 3b				0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities. . . .			14	25,130	
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.			14		
8 Gain or (loss) from sales of assets other than inventory			18	189,887	
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		215,017	0

13 **Total.** Add line 12, columns (b), (d), and (e). 13 215,017

(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) (See instructions)

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)		No
(2) Other assets	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization	1b(2)		No
(3) Rental of facilities, equipment, or other assets	1b(3)		No
(4) Reimbursement arrangements	1b(4)		No
(5) Loans or loan guarantees	1b(5)		No
(6) Performance of services or membership or fundraising solicitations	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		No

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

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☑ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

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

******	2015-10-15	******
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
JACQUELINE R MCCOY				P00140149

Firm's name ▶ PAUL MCCOY FAMILY OFFICE SERVICES LLP

Firm's EIN ▶ 04-3540129

Firm's address ▶ 31 ST JAMES AVENUE SUITE 740 BOSTON, MA 02116

Phone no (617) 933-3600

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
WISDOMTREE TRUST BRAZILIAN REAL STRATEGY FUND	P	2013-10-09	2014-01-27
ISHARES TR RUSSELL 2000 ETF	P	2013-06-28	2014-02-06
ISHARES TR RUSSELL 2000 ETF	P	2012-11-05	2014-02-06
ISHARES TR RUSSELL 2000 ETF	P	2012-12-20	2014-02-06
VANGUARD DIV APPRCIATION	P	2011-02-01	2014-02-06
VANGUARD DIV APPRCIATION	D	2011-02-01	2014-02-06
VANGUARD DIV APPRCIATION	D	2010-03-17	2014-02-06
VANGUARD DIV APPRCIATION	P	2010-06-02	2014-02-06
ISHARES MSCI GRMNY GERMA NY ETF	P	2012-11-05	2014-02-12
ISHARES MSCI GRMNY GERMANY ETF	P	2012-12-20	2014-02-12

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
58,210		62,771	-4,561
876		782	94
8,429		6,296	2,133
61,742		47,669	14,073
8,078		6,123	1,955
8,007		6,069	1,938
36,066		24,875	11,191
15,022		9,806	5,216
16,162		11,923	4,239
3,313		2,647	666

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-4,561
			94
			2,133
			14,073
			1,955
			1,938
			11,191
			5,216
			4,239
			666

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
POWERSHS QQQ TRUST SER 1	P	2012-12-20	2014-02-12
POWERSHS QQQ TRUST SER 1	P	2012-11-05	2014-02-12
WISDOMTREE ASIA ETF LOCAL DEBT FUND	D	2012-12-18	2014-04-16
ISHARES TR BOND 1-3 YEAR CREDIT BOND ETF	P	2014-02-06	2014-06-06
WISDOMTREE JPN HDGD EQTY JAPAN HEDGED EQUITY FUN D	P	2013-01-17	2014-06-06
WISDOMTREE JPN HDGD EQTY JAPAN HEDGED EQUITY FUND	P	2013-02-06	2014-06-06
ISHARES MSCI UTD KINGDM UNITED KINGDOM ETF	P	2013-06-28	2014-06-12
S P D R S&P 500 ETF TR EXPIRING 01/22/2118	P	2013-02-20	2014-06-12
VANGUARD TOTAL STOCK MKT	P	2011-05-31	2014-06-12
VANGUARD TOTAL STOCK MKT	D	2011-05-31	2014-06-12

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
21,064		15,716	5,348
889		654	235
26,086		26,086	0
127,851		127,940	-89
45,689		35,608	10,081
27,005		22,855	4,150
6,792		5,516	1,276
10,469		8,231	2,238
2,309		1,605	704
4,517		3,141	1,376

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			5,348
			235
			0
			-89
			10,081
			4,150
			1,276
			2,238
			704
			1,376

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
EGSHARES ETF EMERGING MA RKETS CONSUMER	P	2012-12-20	2014-06-17
EGSHARES ETF EMERGING MARKETS CONSUMER	P	2012-12-06	2014-06-17
GLOBAL X ETF NEXT EMERGING & FRONTIER	P	2014-04-16	2014-06-17
ISHARES ETF AAA- A RATED CORPORATE BOND	P	2012-12-20	2014-06-17
ISHARES ETF AAA- A RATED CORPORATE BOND	P	2012-11-05	2014-06-17
ISHARES GOLD TRUST	P	2013-02-06	2014-06-17
ISHARES GOLD TRUST	P	2012-12-20	2014-06-17
ISHARES GOLD TRUST	P	2012-11-05	2014-06-17
ISHARES GOLD TRUST	P	2011-12-08	2014-06-17
ISHARES MSCI ETF INDIA ETF	P	2014-06-06	2014-06-17

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
12,762		12,409	353
8,372		7,899	473
21,863		21,671	192
16,655		17,035	-380
9,451		9,721	-270
2,856		3,786	-930
30,334		39,497	-9,163
16,176		21,547	-5,371
6,697		9,204	-2,507
44,587		44,534	53

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			353
			473
			192
			-380
			-270
			-930
			-9,163
			-5,371
			-2,507
			53

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
ISHARES MSCI GRMNY GERMA NY ETF	P	2013-06-28	2014-06-17
ISHARES MSCI GRMNY GERMANY ETF	P	2012-12-20	2014-06-17
ISHARES MSCI UTD KINGDM UNITED KINGDOM ETF	P	2013-06-28	2014-06-17
ISHARES TR BOND 7-10 YEA R TREAS BOND ETF	P	2012-12-20	2014-06-17
ISHARES TR BOND 7-10 YEA R TREAS BOND ETF	D	2011-05-31	2014-06-17
ISHARES TR BOND 7-10 YEAR TREAS BOND ETF	P	2012-11-05	2014-06-17
ISHARES TR RUSSELL 2000 ETF	P	2013-06-28	2014-06-17
ISHARES TR TIPS BOND ETF	D	2012-12-18	2014-06-17
ISHARES TR TIPS BOND ETF	P	2012-12-20	2014-06-17
ISHARES TR TIPS BOND ETF	P	2012-11-05	2014-06-17

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
33,103		25,698	7,405
55,777		43,270	12,507
44,515		36,105	8,410
921		966	-45
29,998		28,310	1,688
13,822		14,563	-741
45,911		38,326	7,585
8,534		8,534	0
10,127		10,841	-714
23,214		24,904	-1,690

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			7,405
			12,507
			8,410
			-45
			1,688
			-741
			7,585
			0
			-714
			-1,690

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
ISHARES TR TIPS BOND ETF	P	2012-02-02	2014-06-17
PIMCO ETF 0-5 YR HIGH YI ELD CORP BOND INDEX EXC H ANGE	P	2014-02-06	2014-06-17
PIMCO ETF 0-5 YR HIGH YI ELD CORP BOND INDEX EXC H ANGE	P	2013-06-25	2014-06-17
PIMCO ETF 0-5 YR HIGH YI ELD CORP BOND INDEX EXCH ANGE	P	2013-02-25	2014-06-17
PIMCO ETF 0-5 YR HIGH YIELD CORP BOND INDEX EXCHANGE	P	2013-02-06	2014-06-17
POWERSHARES S&P ETF 500 LOW VOLATILITY PORTFOLIO	P	2012-12-20	2014-06-17
POWERSHS DB COMMDTY INDX	P	2012-12-20	2014-06-17
POWERSHS DB COMMDTY INDX	P	2012-11-05	2014-06-17
POWERSHS DB COMMDTY INDX	P	2012-06-06	2014-06-17
POWERSHS DB COMMDTY INDX	P	2011-02-01	2014-06-17

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
2,959		3,102	-143
20,418		20,232	186
26,512		25,328	1,184
14,753		14,169	584
42,761		41,640	1,121
48,263		38,673	9,590
4,851		5,049	-198
18,743		19,344	-601
4,215		4,010	205
4,851		5,265	-414

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			-143
			186
			1,184
			584
			1,121
			9,590
			-198
			-601
			205
			-414

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
POWERSHS DB COMMDTY INDX	D	2010-02-02	2014-06-17
POWERSHS QQQ TRUST SER 1	P	2012-12-20	2014-06-17
S P D R S&P 500 ETF TR E XPIRING 01/22/2118	P	2013-06-28	2014-06-17
S P D R S&P 500 ETF TR EXPIRING 01/22/2118	P	2013-02-20	2014-06-17
SPDR BARCLAYS ETF 1-3 YE AR US CORP INVESTMENT GR ADE INDEX	P	2012-12-20	2014-06-17
SPDR BARCLAYS ETF 1-3 YEAR US CORP INVESTMENT GRADE INDEX	P	2013-06-25	2014-06-17
VANGUARD BOND INDEX FUND TOTAL BOND MARKET ETF	P	2012-12-20	2014-06-17
VANGUARD BOND INDEX FUND TOTAL BOND MARKET ETF	P	2012-11-05	2014-06-17
VANGUARD BOND INDEX FUND TOTAL BOND MARKET ETF	P	2012-02-02	2014-06-17
VANGUARD BOND INDEX FUND TOTAL BOND MARKET ETF	D	2011-02-01	2014-06-17

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
28,764		25,724	3,040
90,717		64,985	25,732
25,510		21,099	4,411
64,068		50,148	13,920
64,993		64,974	19
9,684		9,656	28
13,469		13,936	-467
64,653		67,256	-2,603
6,449		6,632	-183
20,980		20,551	429

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			3,040
			25,732
			4,411
			13,920
			19
			28
			-467
			-2,603
			-183
			429

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
VANGUARD BOND INDEX FUND TOTAL BOND MARKET ETF	P	2011-02-01	2014-06-17
VANGUARD BOND INDEX FUND TOTAL BOND MARKET ETF	D	2010-06-02	2014-06-17
VANGUARD DIV APPRCIATION	P	2014-06-06	2014-06-17
VANGUARD DIV APPRCIATION	P	2012-12-20	2014-06-17
VANGUARD DIV APPRCIATION	P	2012-11-05	2014-06-17
VANGUARD DIV APPRCIATION	D	2011-10-05	2014-06-17
VANGUARD DIV APPRCIATION	P	2011-10-05	2014-06-17
VANGUARD DIV APPRCIATION	D	2011-02-01	2014-06-17
VANGUARD FTSE EMERGING M ARKETS ETF	P	2012-11-05	2014-06-17
VANGUARD FTSE EMERGING M ARKETS ETF	P	2011-10-05	2014-06-17

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
20,245		19,831	414
8,735		8,592	143
9,466		9,501	-35
35,150		27,244	7,906
45,935		34,964	10,971
8,458		5,313	3,145
4,345		2,730	1,615
388		269	119
3,458		3,354	104
2,161		1,800	361

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			414
			143
			-35
			7,906
			10,971
			3,145
			1,615
			119
			104
			361

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
VANGUARD FTSE EMERGING M ARKETS ETF	D	2011-10-05	2014-06-17
VANGUARD FTSE EMERGING MARKETS ETF	P	2011-06-14	2014-06-17
VANGUARD FTSE ETF DEVELO PED MARKETS	P	2012-12-20	2014-06-17
VANGUARD FTSE ETF DEVELO PED MARKETS	P	2012-06-06	2014-06-17
VANGUARD FTSE ETF DEVELOPED MARKETS	P	2012-11-05	2014-06-17
VANGUARD INTL EQTY ETF GLOBAL EX-US REAL ESTATE	P	2013-10-09	2014-06-17
VANGUARD REIT	P	2014-06-06	2014-06-17
VANGUARD REIT	P	2012-12-20	2014-06-17
VANGUARD TOTAL STOCK MKT	P	2012-11-05	2014-06-17
VANGUARD TOTAL STOCK MKT	P	2011-10-05	2014-06-17

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
8,127		6,767	1,360
7,479		8,676	-1,197
37,502		30,866	6,636
5,394		3,762	1,632
17,681		13,711	3,970
27,602		27,246	356
24,376		25,011	-635
46,752		41,226	5,526
11,526		8,280	3,246
10,211		5,827	4,384

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			1,360
			-1,197
			6,636
			1,632
			3,970
			356
			-635
			5,526
			3,246
			4,384

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
VANGUARD TOTAL STOCK MKT	D	2011-10-05	2014-06-17
VANGUARD TOTAL STOCK MKT	D	2011-05-31	2014-06-17
WISDOMTREE ASIA ETF LOCA L DEBT FUND	D	2012-12-18	2014-06-17
WISDOMTREE ASIA ETF LOCA L DEBT FUND	P	2012-12-20	2014-06-17
WISDOMTREE ASIA ETF LOCAL DEBT FUND	P	2012-11-05	2014-06-17
WISDOMTREE JPN HDGD EQTY JAPAN HEDGED EQUITY FUND	P	2013-02-06	2014-06-17
PIMCO ETF 0-5 YR HIGH YIELD CORP BOND INDEX EXCHANGE	P	2014-02-06	2014-07-10
WISDOMTREE JPN HDGD EQTY JAPAN HEDGED EQUITY FUND	P	2013-02-06	2014-07-10
ISHARES MSCI GRMNY GERMANY ETF	P	2013-06-28	2014-08-20
ISHARES MSCI UTD KINGDM	P	2013-06-28	2014-10-09

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
25,882		14,768	11,114
11,930		8,235	3,695
4,724		4,724	0
2,214		2,380	-166
15,058		16,111	-1,053
45,050		37,844	7,206
22,630		22,562	68
23,025		19,272	3,753
18,550		15,993	2,557
20,001		18,689	1,312

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			11,114
			3,695
			0
			-166
			-1,053
			7,206
			68
			3,753
			2,557
			1,312

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
POWERSHS QQQ TRUST SER 1	P	2012-12-20	2014-10-23
VANGUARD BOND INDEX FUND TOTAL BOND MARKET ETF	P	2012-02-02	2014-10-23
VANGUARD REIT	P	2014-06-06	2014-10-23
CHARLES SCWHAB - WASH SALES	P	2013-01-01	2014-12-31
VANGUARD BOND INDEX FUND	P	2013-01-01	2014-04-07
PIMCO ETF	P	2014-01-01	2014-12-16
PIMCO ETF	P	2013-01-01	2014-12-16
VANGUARD BOND INDEX FUND	P	2013-01-01	2014-12-30
VANGUARD BOND INDEX FUND	P	2014-12-01	2014-12-30

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
3,432		2,321	1,111
2,972		3,029	-57
2,468		2,433	35
1,744			1,744
19			19
192			192
85			85
92			92
80			80

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			1,111
			-57
			35
			1,744
			19
			192
			85
			92
			80

Form 990PF Part XV Line 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*				
BRIGHAM & WOMENS 116 HUNTINGTON AVENUE THIRD FLOOR BOSTON,MA 02116	NONE	OTHER PUBLIC CHARITY	GENERAL SUPPORT	10,000
HARVARD BUSINESS SCHOOL 124 MOUNT AUBURN STREET CAMBRIDGE,MA 02138	NONE	OTHER PUBLIC CHARITY	GENERAL SUPPORT	200,000
INSTITUTE OF CONTEMPORARY ART 100 NORTHERN AVENUE BOSTON,MA 02210	NONE	OTHER PUBLIC CHARITY	GENERAL SUPPORT	200,000
INSTITUTE OF CONTEMPORARY ART 100 NORTHERN AVENUE BOSTON,MA 02210	NONE	OTHER PUBLIC CHARITY	GENERAL SUPPORT	10,000
MATCH SCHOOL 1001 COMMONWEALTH AVENUE BOSTON,MA 02215	NONE	OTHER PUBLIC CHARITY	GENERAL SUPPORT	250,000
ROSE KENNEDY GREENWAY CONSERVANCY 185 KNEELAND STREET 7TH FLOOR BOSTON,MA 02111	NONE	OTHER PUBLIC CHARITY	GENERAL SUPPORT	5,000
ROXBURY LATIN SCHOOL 101 ST THERESA AVENUE WEST ROXBURY,MA 02132	NONE	OTHER PUBLIC CHARITY	GENERAL SUPPORT	200,000
SUMMER SEARCH 500 SANSOME STREET SUITE 350 SAN FRANCISCO,CA 94111	NONE	OTHER PUBLIC CHARITY	GENERAL SUPPORT	5,000
VANDERBILT UNIVERSITY 2301 VANDERBILT PLACE NASHVILLE,TN 37240	NONE	OTHER PUBLIC CHARITY	GENERAL SUPPORT	500,000
WINSOR SCHOOL PILGRIM ROAD BOSTON,MA 02215	NONE	OTHER PUBLIC CHARITY	GENERAL SUPPORT	250,000
Total . . . . ▶ **3a**				1,630,000

TY 2014 Other Assets Schedule

Name: THE EVANS FAMILY FOUNDATION

EIN: 04-3523698

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
ETFS	1,978,470	702,928	738,231

TY 2014 Other Expenses Schedule

Name: THE EVANS FAMILY FOUNDATION

EIN: 04-3523698

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OTHER EXPENSES	25	25		0
POWERSHARES LOSSES REPORTED ON K-1	10,424	10,424		0

TY 2014 Other Professional Fees Schedule

Name: THE EVANS FAMILY FOUNDATION

EIN: 04-3523698

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CAPITAL GUARDIAN	0	0		0
CHARLES SCHWAB	10,495	10,495		0

TY 2014 Substantial Contributors Schedule

Name: THE EVANS FAMILY FOUNDATION

EIN: 04-3523698

Name	Address
BRUCE R BRIDGITT B EVANS	31 ST JAMES AVE SUITE 740 BOSTON, MA 02116

TY 2014 Taxes Schedule

Name: THE EVANS FAMILY FOUNDATION

EIN: 04-3523698

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL TAXES	15,000	0		0
MASSACHUSETTS FEES	250	250		0

Schedule B

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

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No 1545-0047

2014

Name of the organization
THE EVANS FAMILY FOUNDATION

Employer identification number
04-3523698

Organization type (check one)

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☑ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

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

General Rule

☑ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling $5,000 or more (in money or other property) from any one contributor Complete Parts I and II See instructions for determining a contributor's total contributions

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc , purposes, but no such contributions totaled more than $1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions totaling $5,000 or more during the year . . . . ▶ $ ____________

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

Name of organization
THE EVANS FAMILY FOUNDATION

Employer identification number
04-3523698

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	BRUCE R BRIDGITT B EVANS 31 ST JAMES AVENUE SUITE 740 BOSTON, MA 02116	$ 1,000,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization
THE EVANS FAMILY FOUNDATION

Employer identification number
04-3523698

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(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
		$	

(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
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

Name of organization
THE EVANS FAMILY FOUNDATION

Employer identification number
04-3523698

Part III *Exclusively* **religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than $1,000 for the year from any one contributor.** Complete columns **(a)** through **(e) and** the following line entry For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc , contributions of **$1,000 or less** for the year (Enter this information once See instructions) ▶ $ ____________

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(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

(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

(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