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

OMB No 1545-0052

Form **990-PF**

Do not enter social security numbers on this form as it may be made public.

SUVO	Interna Depar	ment of al Rever	nue Service Information about Form 990-PF	and its separate					Open to Public Inspection
•	For	calend	dar year 2014 or tax year beginning , a	and ending					
AON	Nar	ne of fou	undation				A Empl	oyer identification number	
_ ⊒	_T	HE .	ALCHEMY FOUNDATION				04	-3541830	
မေ			d street (or P O box number if mail is not delivered to street address) LAKEVIEW AVE		Roor	m/suite		hone number (see instruction $7-731-6727$	5)
201			n, state or province, country, and ZIP or foreign postal code				C If exe	mption application is pending	check here
ij			RIDGE MA 02138					The state of the s	
	G C	heck		rn of a former publ	lic cha	arity	D 1 Fo	oreign organizations, check he	ere •
			Final return Amended					oreign organizations meeting	
			Address change Name cha	<u> </u>			85	6% test, check here and attack	computation
г	\neg		type of organization 🗶 Section 501(c)(3) exempt private					ate foundation status was terr	ninated under
l				le private foundation		-		n 507(b)(1)(A), check here	
			rket value of all assets at J Accounting method	X Cash	Accru	ıal		foundation is in a 60-month to section 507(b)(1)(B), check h	. []
			ear (from Part II, col (c), > \$ 2,709,124 (Part I, column (d) must	ho			under	section 307 (b)(1)(b), check i	lete P
		e 16) u rt !	Analysis of Revenue and Expenses (The total of	i) 				(d) Disbursements
	1 6		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 invi		(c) Adjusted net Income	for charitable purposes (cash basis only)
•		1	Contributions, gifts, grants, etc , received (attach schedule)					,	(SCI) SCIE SINY
		2	Check ► X if the foundation is not required to attach Sch B						
Š		3	Interest on savings and temporary cash investments						
30 2015		4	Dividends and interest from securities	35,4	27		35,427		
Ó		5a	Gross rents						
വ	ě	b	Net rental income or (loss)6						
	Revenue	6a	Net gain or (loss) from sale of assets not on line 10	44,6	30				
	Š	b	Gross sales price for all assets on line 6a 44,630						
	œ	7	Capital gain net income (from Part IV, line 2)				14,630		
CANNED		8	Net short-term capital gain					0	
Z		9	Income modifications						
3		10a b	Gross sales less returns and allowances Less Cost of goods sold						
3		C	Gross profit or (loss) (attach schedule)						
(D)		11	Other income (attach schedule) STMT 1	69,3	44		32,299		
		12	Total. Add lines 1 through 11	149,4	_		12,356		
•	10	13	Compensation of officers, directors, trustees, etc	,	0	***			
	nses	14	Other employee salaries and wages						
	en	15	Pension plans, employee benefits						
	Х	16a	Legal fees (attach schedule)						
	e E	b	Accounting fees (attach schedule) STMT 2	5,9	12		5,912		
	Ę	С	Other professional fees (attach schedule)						
	itra	17	Interest						
	nis	18	Taxes (attach schedule) (see instructions) STMT 3	1,5	51		1,551		
	Ξ	19	Depreciation (attach schedule) and depletion						
	Αd	20	Occupancy	<u> </u>			 .		
	ק	21 22	Travel, conferences, and meetings						<u> </u>
	ā	22	Printing and publications Other expenses (alt. sch.) STMT 4	2	12		212		
	Operating and Administrative Expe	24	Total operating and administrative expenses	-				-	
	rat	liti	Add lines 13 through 23	7,6	75		7,675	o	o
	be	8 56		547,4			.,		547,420
	0	26	Contractives, gins, grang மெர்பு Total expenses and disbursements. Add lines 24 and 25	555,0			7,675	0	
		27	Subtract line 26 from line 12	·					7
		а	Excess of revenue over expenses and disbursements	-405,6	94				<u> </u>
		b	Net investment income (if negative, enter -0-)			10	04,681		
		l c	Adjusted net income (if negative, enter -0-)					0	/

Part l	Balance Sheets Attached school los and amounts in the description col	umn		Beginning of year	End o	f year
	should be for end-of-year amounts only (See instruction	ons)		(a) Book Value	(b) Book Value	(c) Fair îvîarket Vălue
1	Cash – non-interest-bearing					
2	Savings and temporary cash investments			229,956	76,752	76,752
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					i
	instructions)					
7	Other notes and loans receivable (att. schedule)				-	
f	Less allowance for doubtful accounts ▶		0]		•
<i>γ</i>) 8	Inventories for sale or use					
Assets 6 8	Prepaid expenses and deferred charges					- -
Ø 10a	Investments – U S and state government obligations (attach schedule)					
Ь	Investments – corporate stock (attach schedule)					
c	Investments – corporate bonds (attach schedule)			-	-	
11	Investments – land, buildings, and equipment basis				······································	
	Less accumulated depreciation (attach sch) ▶					
12	Investments – mortgage loans					
13	Investments – other (attach schedule) SEE STATEMENT	5		2,272,230	2,019,740	2,632,291
14	Land, buildings, and equipment basis				2,023,710	2,032,232
' '	Less accumulated depreciation (attach sch.)			1		
15	Other assets (describe SEE STATEMENT	6)	81	81	81
16	Total assets (to be completed by all filers – see the	·	,	- 01		
'	instructions. Also, see page 1, item I)			2,502,267	2,096,573	2,709,124
17	Accounts payable and accrued expenses			2,302,201	2,090,373	2,709,124
18	Grants payable					
	Deferred revenue					
Liabilities 20 21 22	Loans from officers, directors, trustees, and other disqualified persons					
G 21	Mortgages and other notes payable (attach schedule)	•				
ے 22	Other liabilities (describe					
23	Total liabilities (add lines 17 through 22))	0	0	
+ 23	Foundations that follow SFAS 117, check here		$\overline{}$			
S	and complete lines 24 through 26 and lines 30 and 31.					
Sept 24	Unrestricted					
E 25	Temporarily restricted					
E 25	Permanently restricted					
Net Assets or Fund Balan 82 22 25 25 20 30 31	Foundations that do not follow SFAS 117, check here	•	Y			
괴	and complete lines 27 through 31.		A			
් ₂₇				7 200 000	7 200 000	
ध्र	Capital stock, trust principal, or current funds			7,289,899	7,289,899	
28	Paid-in or capital surplus, or land, bldg, and equipment fund			-4,787,632	E 102 226	
Y 29	Retained earnings, accumulated income, endowment, or other funds			2,502,267	-5,193,326	
30 Set	Total net assets or fund balances (see instructions)			2,302,267	2,096,573	
2 31	Total liabilities and net assets/fund balances (see			2 502 267	0.006.573	
Part I	Instructions)			2,502,267	2,096,573	
	Analysis of Changes in Net Assets or Fund Bala net assets or fund balances at beginning of year – Part II, column (a), I		(m.:	et agree with		
		iine 30	(mu	st agree with		2 502 267
	of-year figure reported on prior year's return)				1	2,502,267
	r amount from Part I, line 27a				_2	-405,694
	r increases not included in line 2 (itemize) ▶				3	2 000 553
	ines 1, 2, and 3				4	2,096,573
	eases not included in line 2 (itemize)			h) (20	5	2 000 550
U TOTAL	net assets or fund balances at end of year (line 4 minus line 5) - Part I	ı, colur	nn (I	o), line 30	6	2,096,573

Part IV Capital Gains and L	osses for Tax on Investme	ent Income			
	kind(s) of property sold (e.g., real estate, se, 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 ALTERNATIVE INVEST	IMENTS OPP		P	ARIOUS	VARIOUS
b ALTERNATIVE INVEST	TMENTS OPP			ARIOUS	VARIOUS
С					
_d		, <u> </u>			
е				· · ·	
(e) Gross sales price	(f) Depreciation allowed (or allowable)		r other basis ense of sale		n or (loss) (f) minus (g)
a 21,894					21,894
ь 22,736					22,736
С					
_d	-				
e					
Complete only for assets showing gain	in column (h) and owned by the fo	oundation on 12/31/	69	(I) Gains (Co	I (h) gain minus
	(j) Adjusted basis	(k) Exces	ss of col (i)		t less than -0-) or
(i) F M V as of 12/31/69	as of 12/31/69	1	(j), if any	Losses (f	rom col (h))
a					21,894
b					22,736
С					
d					
e					_
2 Capital gain net income or (net capital	loss) If gain, also enter in				44,630
3 Net short-term capital gain or (loss) as		_	 		11,000
If gain, also enter in Part I, line 8, colur	` ' '	·			
Part I, line 8	Till (e) (see ilistractions) il (loss), t	Sinter sos in	3		21,894
· · · · · · · · · · · · · · · · · · ·	Section 4940(e) for Reduc	ed Tay on Net			21,094
If section 4940(d)(2) applies, leave this par Was the foundation liable for the section 49 If "Yes," the foundation does not qualify un	942 tax on the distributable amoun		base period?		Yes X No
1 Enter the appropriate amount in each of			ng any entries		
(a)		l l l l l l l l l l l l l l l l l l l		1	(d)
Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	Net value	(c) e of noncharitable-use assets		tribution ratio
2013		,477	3,321,73		0.219306
2012	685	,393	3,870,49	o l	0.177081
2011		,130	3,623,93		0.194300
2010		,976	3,690,42		0.087246
2009		,815	3,805,97		0.099006
			3,003,31	* 	
2 Total of line 1, column (d)				2	0.776939
3 Average distribution ratio for the 5-year	r base period – divide the total on t	ine 2 by 5, or by the	•	-	
number of years the foundation has be				3	0.155388
4 Enter the net value of noncharitable-us	e assets for 2014 from Part X, line	5		4	2,886,948
5 Multiply line 4 by line 3				5	448,597
6 Enter 1% of net investment income (19	% of Part Line 27h				
C Enter 170 of her investment income (15	o or Farti, iiile 270)			6	1,047
7 Add lines 5 and 6				7	449,644
8 Enter qualifying distributions from Part				8	547,420
If line 8 is equal to or greater than line Part VI instructions	r, check the box in Part VI, line 1b	, and complete that	paπ using a 1% tax rate	See the	

Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their

Pa	art 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	i		<u> </u>
	meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		Х
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		х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Х	
	Website address ► N/A			
14	The books are in care of ▶ JEAN & KYRA MONTAGU Telephone no ▶ 617-	731-	672	7
	104 LAKEVIEW AVE			
	Located at ▶ CAMBRIDGE MA ZIP+4 ▶ 0213	8		
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			٠ ـــا
16	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority		Yes	No
	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 ▶			
Pa	art 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.		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?			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a			
	disqualified person?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for			
	the benefit or use of a disqualified person)?			
	(6) Agree to pay money or property to a government official? (Exception Check "No" if the			
	foundation agreed to make a grant to or to employ the official for a period after			
	termination of government service, if terminating within 90 days)			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations			
	section 53 4941(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			
С	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))			
а	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?			
	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) N/A	2b		
С	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?			
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		<u> </u>
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
		Form 99	90-PF	(2014)

"NONE."	uded on line 1 – see inst	ructions). If non	e, enter	
(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 accoun other allowances
NONE				

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

Form 990-PF (2014)

Total Add lines 1 through 3

Pa	art X Minimum Investment Return (All domestic foundations must complete this part Foreig	n fou	ndations
	see instructions)	., , , ,	,
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.,		
	purposes		
а	Average monthly fair market value of securities	1a	2,777,477
b	Average of monthly cash balances	1b	153,354
c	Fair market value of all other assets (see instructions)	1c	81
d	Total (add lines 1a, b, and c)	1d	2,930,912
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	2,930,912
4	Cash deemed held for charitable activities Enter 1½% of line 3 (for greater amount, see		
	instructions)	4	43,964
5	Net value of noncharitable-use assets Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,886,948
6	Minimum investment return. Enter 5% of line 5	6	144,347
Pa	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating to	found	lations
	and certain foreign organizations check here ▶ and do not complete this part)		
1	Minimum investment return from Part X, line 6	1	144,347
2a	Tax on investment income for 2014 from Part VI, line 5		
þ	Income tax for 2014 (This does not include the tax from Part VI)		
С	Add lines 2a and 2b	2c	1,047
3	Distributable amount before adjustments Subtract line 2c from line 1	3	143,300
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	143,300
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII,		
	line 1	7	143,300
Pa	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes	T	
а	Expenses, contributions, gifts, etc. – total from Part I, column (d), line 26	1a	547,420
b	Program-related investments – total from Part IX-B	1b	
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		
а	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	547,420
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	1,047
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	546,373
	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		

P:	art XIII Undistributed Income (see instructions)	·			
			(a)	(b)	(c)	(d)
1	Distributable amount for 2014 from Part XI,		Corpus	Years prior to 2013	2013	2014
	line 7					143,300
2	Undistributed income, if any, as of the end	of 2014				
а	Enter amount for 2013 only					
b	Total for prior years 20 , 20	, 20				
3	Excess distributions carryover, if any, to 20					
а	From 2009	186,516				
b	From 2010	139,743				
С	From 2011	531,803				
d	From 2012	493,522				
е	From 2013	566,331		1		
f	Total of lines 3a through e	,	1,917,915	1		
4	Qualifying distributions for 2014 from Part 2	KII.				
	line 4 ▶ \$ 547,420	,				
а	Applied to 2013, but not more than line 2a					
	Applied to undistributed income of prior year	ars				
	(Election required – see instructions)					
С	in the second of	tion				
	required – see instructions)					
d	Applied to 2014 distributable amount					143,300
e		s	404,120			
5	Excess distributions carryover applied to 20	1	,			
	(If an amount appears in column (d), the sa					
	amount must be shown in column (a))	-				
6	Enter the net total of each column as					
-	indicated below:					
а	Corpus Add lines 3f, 4c, and 4e Subtract I	ine 5	2,322,035	1		
b	Prior years' undistributed income Subtract	ľ				***************************************
	line 4b from line 2b					
С	Enter the amount of prior years' undistribute	ed			***************************************	
	income for which a notice of deficiency has					
	been issued, or on which the section 4942(
	tax has been previously assessed	,				
d	Subtract line 6c from line 6b Taxable					
	amount - see instructions	j				
е	Undistributed income for 2013 Subtract line	e Ì				
	4a from line 2a Taxable amount – see					
	instructions					
f	Undistributed income for 2014 Subtract line	es				
-	4d and 5 from line 1. This amount must be					
	distributed in 2015					0
7	Amounts treated as distributions out of corp	ous				
	to satisfy requirements imposed by section					
	170(b)(1)(F) or 4942(g)(3) (Election may be					
	required—see instructions)					
8	Excess distributions carryover from 2009 ne	ot				
	applied on line 5 or line 7 (see instructions)		186,516			
9	Excess distributions carryover to 2015.	ľ	.,			
	Subtract lines 7 and 8 from line 6a		2,135,519	1		
10	Analysis of line 9	ł	,===,			
а	Excess from 2010	139,743		1		
b	Excess from 2011	531,803				
c	Excess from 2012	493,522				
d	Excess from 2013	566,331				
e	Excess from 2014	404,120				

Pa	art XIV Private Operating For	undations (see in	structions and Par	rt VII-A, question 9)	
ia	If the foundation has received a ruling or	determination letter th	at it is a private opera	ting		
	foundation, and the ruling is effective for	2014, enter the date of	of the ruling	•		
b	Check box to indicate whether the found	ation is a private opera	ating foundation descri	bed in section 49	942(j)(3) or 494	2(j)(5)
2a	Enter the lesser of the adjusted net	Tax year		Prior 3 years		
	income from Part I or the minimum	(a) 2014	(b) 2013	(c) 2012	(d) 2011	(e) Total
	investment return from Part X for			· · · · · · · · · · · · · · · · · · ·		
	each year listed					
b	85% of line 2a	·				
c	Qualifying distributions from Part XII,					
·	line 4 for each year listed					
d	Amounts included in line 2c not used directly			 		
u	for active conduct of exempt activities					
•	Qualifying distributions made directly	_				
е	, ,					
	for active conduct of exempt activities					
,	Subtract line 2d from line 2c			_		
3	Complete 3a, b, or c for the					
	alternative test relied upon					
а	"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		, <u></u>			
С	"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	I				
	an exempt organization					
	(4) Gross investment income					
Pa	rt XV Supplementary Inforn	nation (Complete	this part only if	the foundation ha	d \$5,000 or more	e in assets at
	any time during the ye	ear – see instruct	tions.)			
1	Information Regarding Foundation Ma	nagers				
а	List any managers of the foundation who	have contributed mor	e than 2% of the total	contributions received	by the foundation	
	before the close of any tax year (but only	if they have contribute	ed more than \$5,000)	(See section 507(d)(2))	
	SEE STATEMENT 7					
b	List any managers of the foundation who	own 10% or more of t	he stock of a corporat	ion (or an equally large	portion of the	
	ownership of a partnership or other entity) of which the foundat	ion has a 10% or grea	ter interest		
	N/A					
2	Information Regarding Contribution, G	Grant, Gift, Loan, Sch	olarship, etc., Progra	ams:		
	Check here ► X if the foundation only	makes contributions	to preselected charitat	ole organizations and d	oes not accept	
	unsolicited requests for funds If the foun					
	other conditions, complete items 2a, b, c		,	•		
а	The name, address, and telephone numb		of the person to whom	applications should be	addressed	
	N/A			.,	· • • • • • •	
b	The form in which applications should be	submitted and inform	ation and materials the	ev should include		
-	N/A	The same and an office	una materiale tri	-,a.ao.aaa		
С	Any submission deadlines					-
-	N/A					
d	Any restrictions or limitations on awards,	such as by geographi	cal areas, charitable fi	elds kinds of institution	ns or other	
~	factors	July 25 by goograpin	ca. areas, chantable if	oloo, kiiloo or iiisiituttot	is, or other	
	N/A					
	,					

Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Foundation Recipient show any relationship to Purpose of grant or status of Amount any foundation manager contribution recipient Name and address (home or business) or substantial contributor a Paid during the year SEE SCHEDULE A ATTACHED 547,420 547,420 Total ▶ 3a **b** Approved for future payment N/A Total **▶** 3b

DAA

Enter gross am		ivities				
	ounts unless otherwise indicated	Unrelate	d business income	Exclude	by section 512, 513, or 514	
. 5		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	(e) Related or exempt function income (See instructions)
1 Program se			· · · · · · · · · · · · · · · · · · ·			(000 included of 0)
a						
					_	
		-				
_		-				
f	d - Lorda Communication	-				
_	nd contracts from government agencies	-				
	p dues and assessments					
	savings and temporary cash investments	+		14	25 427	
	and interest from securities			14	35,427	•••••••
	ncome or (loss) from real estate	<u> </u>				-6
	nanced property	<u> </u>			_	
	ot-financed property					
7 Other inves	ncome or (loss) from personal property	+		14	32,299	
	s) from sales of assets other than inventory	 		14	44,630	
•	or (loss) from special events				44,030	
	t or (loss) from sales of inventory	1				
11 Other rever	· · · ·	1				
	NARY INCOME FROM SCH K-1	1		14	24,916	
	FROM SCH K-1	900001	12,129		21,320	
e						
	dd columns (b), (d), and (e)		12,129		137,272	-6
	line 12, columns (b), (d), and (e)				13	149,395
	in line 13 instructions to verify calculations)					.,
Part XVI-B		complishme	ent of Exempt Pu	rpose	S	<i>(</i> -
Line No	Explain below how each activity for which income	is reported in co	olumn (e) of Part XVI-	A contrib	uted importantly to the	
	accomplishment of the foundation's exempt purpo	ses (other than	by providing funds for	such pu	rposes) (See instruction	ons)
5A	INVESTMENT INCOME TO BE	USED FOR	CHARITABLE	E PU	RPOSES	

Pt		Information Reg Exempt Organiz	_	nsfers To an	d Transactio	ns and Relations	hips With Nonchari	table		
1	-			e in any of the fol	lowing with any o	other organization desc			Yes	No
,	_				- •	ection 527, relating to p			162	NO
	organization	ıs?								ĺ
а	Transfers from	om the reporting found	lation to a nor	ncharitable exemp	pt organization o	f				1
	(1) Cash							1a(1)		X
	(2) Other as	ssets						1a(2)		X
b	Other transa	actions								ĺ
	(1) Sales of	f assets to a noncharit	able exempt o	organization				1b(1)		X
	(2) Purchas	ses of assets from a no	oncharitable e	exempt organizati	on			1b(2)		X
	(3) Rental of	of facilities, equipment	, or other asse	ets				1b(3)		Х
	(4) Reimbu	rsement arrangements	5					1b(4)		X
	(5) Loans o	r Ioan guarantees						1b(5)		X
	(6) Perform	ance of services or me	embership or	fundraising solici	tations			1b(6)		X
С	Sharing of fa	acilities, equipment, m	ailing lists, oth	her assets, or pai	id employees			1c		X
d	If the answe	er to any of the above i	s "Yes," comp	olete the following	schedule Colu	mn (b) should always s	show the fair market			
	value of the	goods, other assets, o	or services giv	en by the reporti	ng foundation If	the foundation receive	d less than fair market			
	value in any	transaction or sharing	arrangement	t, show in column	(d) the value of	the goods, other asset	ts, or services received			
	(a) Line no	(b) Amount involved	(c) Name	of noncharitable exem	pt organization	(d) Description of	of transfers, transactions, and shar	ing arrangeme	ents	
N/Z	A									
								•		
									·	
					-					
	_									
	-									
	described in If "Yes," con	section 501(c) of the nplete the following sc	Code (other the	han section 501(d	c)(3)) or in sectio	-exempt organizations n 527?		Y	es X	No No
		Name of organization		(b) Type of o	organization		(c) Description of relationship		_	
	N/A		\longrightarrow							
			\longrightarrow							
		<u>-</u>				<u> </u>				
										
	Under ner	nalties of periury. I declare th	at I have examine	ed this return including	a accompanying sch	edules and statements, and to	o the best of my knowledge and I	holiof it is true		
	correct, ar	nd complete Declaration of p	oreparer (other the	an taxpayer) is based	on all information of	which preparer has any know	vledge	•		
Sigi Her		ature of lofficer or trustee	2400	2		13 15 		S discuss this reparer shown bettions)?		No
		pe preparer's name							Г	
	Printry	ре ргерагет з папів			Preparer's of natur	7	0	ate	Check	_
Paid	וספוזק	ELL C. STAMM,	CPA		1 11/2	7		/12/15	self-em	pioyed
Prep	arer	- D C		& COMPAN	· / D			P00525		
Use	Only Firm's n			ST STE 10				7-256		
	Firm's a	ddress ► 280 F DEDHA		02026-1			_			
	1		ma, MA	02020-1	133		Phone no	81-32	9-4	

Federal Statements

04-3541830

Statement 1 - Form 990-PF, Part I, Line 11 - Oth	ner Income	
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Statement 1 - Fo	FI	
Statement 1 - F	10	
Statement 1	÷	
Statement :	-	
	Statement 1	

Revenue per Net Investment Adjusted Net Books Income Income	\$ 32,299 \$ 32,299 \$ 32,299 \$ 12,129	\$ 69,344 \$ 32,299 \$
Description	OTHER INCOME ORDINARY INCOME FROM SCH K-1 UBIT FROM SCH K-1	TOTAL

Statement 2 - Form 990-PF, Part I, Line 16b - Accounting Fees

Charitable	Purpose	<i>v</i> ۶		٥ «	
Adjusted	Net	৵		\$	
Net	/estment	3,943	1, 369	5,912	
	<u>=</u>	٧٠		φ •	
otal		3,943	1, 409	5,912	
		‹ ›		φ·	
	Description	ACCOUNTING	BOOKREEFING	TOTAL	

Statement 3 - Form 990-PF, Part I, Line 18 - Taxes

Charitable Purpose	⟨v-	\$
Adjusted Net	S	O
Net ivestment	1,551	1,551
-	က ျ	w.
Total	1,551	1,551
	ᡐ	ςς.
Description	INDIRECT TAXES/LICENSES	TOTAL

٠.

		Charitable Purpose	v.		O
	Expenses	Adjusted Net	v ₂		\[\cdot \] \[\cd
Federal Statements	- Form 990-PF, Part I, Line 23 - Other Expenses	Net Investment	φ «	186	\$ 212
Federal	Statement 4 - Form 990-PF, I	Total	\$	186	\$ 212
04-3541830	State	Description	RENTS FROM K-1 OTHER EXPENSES	EXPENSES OFFICE SUPPLIES	BANK CHARGES TOTAL

<u>nts</u>	Basis of Fair Market	\$ 2,632,291 \$ 2,632,291
- Form 990-PF, Part II, Line 13 - Other Investments		\$ 2,019,740 \$ 2,019,740
	Beginning of Year	\$ 2,272,230 \$ 2,272,230
Statement 5	Description	ALTERNATIVE INVESTMENTS K-1S TOTAL

04-3541830

Federal Statements

Statement 6 - Form 990-PF, Part II, Line 15 - Other Assets

Description	ginning Year	 End of Year	 Fair Market Value
DIVIDEND RECEIVABLE	\$ 81	\$ 81	\$ 81
TOTAL	\$ 81	\$ 81	\$ 81

Statement 7 - Form 990-PF, Part XV, Line 1a - Managers Who Contributed Over 2% or \$5,000

Name of Manager	Amoun	<u>ıt </u>
KYRA MONTAGU	\$	
JEAN MONTAGU		
TOTAL	\$	0

EIN: 04-354	1830	
	Attachment - Schedule A	
Date	Payee	Amount
01/27/2014	Perkins School For The Blind	1,000 00
01/27/2014	Beacon Academy	10,000 00
01/27/2014	Boston Public Library Foundation	250 00
01/31/2014	Conservatory Lab Charter School	2,500 00
02/21/2014	Friends of Cambridge Public Library	500 00
02/24/2014	Max Warburg Courage Curriculum,Inc	250 00
02/24/2014	Metco	500 00
02/24/2014	Museum Of Science	1,000 00
02/24/2014	Wbur	5,000 00
02/24/2014	Teach For America	500 00
02/24/2014	Boston Architectual College	250 00
02/24/2014	Boston Childrens Museum	20,000 00
02/24/2014	Cambridge Center For Adult Education	2,500 00
02/24/2014	Citizen Schools	1,000 00
02/24/2014	Facing History and Ourselves	750 00
02/24/2014	Mass Audubon	200 00
02/24/2014	Simmons College	1,500 00
02/24/2014	MIT	2,500 00
02/24/2014	Opus 118	125 00
02/24/2014	First Literacy	250 00
02/24/2014	Primary Source	500 00
02/24/2014	Neighborhood House Charter School	1,500 00
02/24/2014	Bishop Strachan School, Inc	200 00
02/24/2014	Harvard College Fund	250 00
02/24/2014	International Institute Of New England	1,500 00
02/24/2014	Mits, Inc	250 00
02/24/2014	Union of Concerned Scientists (UCS)	500 00
02/24/2014	Beacon Academy	10,000 00
02/24/2014	AAAS	200 00
02/24/2014	Career Collaborative Inc	250 00
02/24/2014	Harris Center for Conservation Education	100 00
02/24/2014	Boston Childrens Museum	5,000 00
02/24/2014	Max Warburg Courage Curriculum,Inc	250 00
02/24/2014	ASCI	10,000 00
02/24/2014	Associates Of The Boston Public Library	450 00
02/24/2014	Neighborhood House Charter School	500 00

02/24/2014	Perkins School For The Blind	500 00
04/22/2014		
	Prospect Sierra School	1,000 00
04/22/2014	Radcliffe Institute for Advanced Study	250 00
04/22/2014	Whitehead Institute	1,500 00
05/12/2014	UCSF Foundation	15,000 00
05/12/2014	ACLU	500 00
05/12/2014	Friends Of Boston's Homeless	500 00
05/12/2014	Partners in Health	2,500 00
05/12/2014	Aids Action Committee	1,000 00
05/12/2014	The Petra Foundation	2,500 00
05/12/2014	NAACP	100 00
05/12/2014	MGH	2,500 00
05/12/2014	Boston Rescue Mission	100 00
05/12/2014	Boston Women's Fund	250 00
05/12/2014	Brookline Community Mental Health Center	500 00
05/12/2014	Community Cooks	500 00
05/12/2014	Crittenton Women's Union	250 00
05/12/2014	Doctors Without Borders	5,000 00
05/12/2014	Habitat For Humanity International	250 00
05/12/2014	Haymarket People's Fund	250 00
05/12/2014	Human Rights Watch	500 00
05/12/2014	Massachusetts Coalition for the Homeless	100 00
05/12/2014	Rogerson Communities, Inc	1,000 00
05/12/2014	Shared Interest	200 00
05/12/2014	South End Community Health Center	500 00
05/12/2014	The Food Project	250 00
05/12/2014	League Of Women Voters	100 00
05/12/2014	Massachusetts Eye and Ear	100 00
05/12/2014	Bringham and Women's Hospital	100 00
05/12/2014	Rosie's Place	500 00
05/12/2014	Greater Boston Food Bank	500 00
05/12/2014	Women's Lunch Place	500 00
05/12/2014	Doctors Without Borders	2,500 00
05/12/2014	Planned Parenthood Federation Of America	5,000 00
05/12/2014	The Guidance Center	500 00
05/12/2014	Macular Degeneration Research	100 00
05/12/2014	Somerville-Cambridge Elder Services	100 00
05/12/2014	The Family Center	500 00
05/12/2014	American Red Cross	200 00
05/12/2014	South Africa Partners	250 00
05/12/2014	Thursday Morning Talks	350 00
05/12/2014	On The Rise	500 00
		-
05/12/2014	American Cancer Society	100 00
05/12/2014	The Fund for Brigham and Women's Hospital	150 00

	05/12/2014	Pine Steet Inn	1,000 00
	05/12/2014	Ashoka Innovators for the Public	1,000 00
	05/12/2014	Dana-Farber Cancer Institute	125 00
	05/12/2014	Community Change, Inc.	100 00
	05/12/2014	Oxfam America	1,000 00
	05/12/2014	FINCA	250 00
	05/12/2014		
		Massachusetts Housing & Shelter Alliance	100 00
	05/12/2014	Mspcc	200 00
	05/12/2014	Indian Law Resource Center	150 00
	05/12/2014	Hearth	400 00
	05/12/2014	Partners in Health	2,500 00
-	05/12/2014	Doctors Without Borders	2,500 00
_	05/12/2014	Population Connection	1,000 00
_	05/12/2014	South End Community Health Center	250 00
	05/12/2014	ACLU	250 00
	05/12/2014	Planned Parenthood League Of Mass	5,000 00
	05/12/2014	Partners in Health	1,000 00
	05/12/2014	Mspcc	100 00
	05/12/2014	Planned Parenthood Federation Of America	1,000 00
_	05/12/2014	The Home for Little Wanderers	150 00
	06/23/2014	Family To Family Project	250 00
	06/23/2014	NAMI	250 00
	06/23/2014	Greater Boston Food Bank	250 00
	06/23/2014	Rosie's Place	250 00
	06/23/2014	Massachusetts Coalition for the Homeless	100 00
	06/23/2014	Women's Lunch Place	500 00
	06/23/2014	Boston Health Care for the Homeless Progr	250 00
	06/23/2014	Ceres	5,000 00
	06/23/2014	Oxfam America	1,000 00
	06/23/2014	Metrics For Management	100,000 00
	06/23/2014	Austen Riggs Center	100 00
	06/23/2014	Boston Women's Fund	150 00
	06/23/2014	Crittenton Women's Union	100 00
	06/23/2014	Family Service Of Greater Boston	250 00
	06/23/2014	Garden of Peace	100 00
	06/23/2014	Gırls, Inc	250 00
	06/23/2014	Greater Boston Food Bank	250 00
	06/23/2014	Oxfam America	1,500 00
	06/23/2014	Rosie's Place	500 00
	06/23/2014	Solutions At Work	200 00
	06/23/2014	Boston Arts Academy	5,000 00
	06/23/2014	American Repertory Theater	3,000 00
	09/22/2014	School Of The Museum Of Fine Arts	1,500 00
	09/22/2014	Institute Of Contemporary Art	1,500 00

	09/22/2014	Commonwelath Shakespeare Company	500 00
	09/22/2014	Decordova Museum & Sculpture Park	2,500 00
	09/22/2014	Isabella Stewart Gardner Museum	10,000 00
L	09/22/2014	Mass College Of Art & Design Foundation	5,000 00
	09/22/2014	Artists For Humanity	250 00
	09/22/2014	Boston Symphony Orchestra	5,000 00
	09/22/2014	Museum Of Fine Arts	5,000 00
	09/22/2014	Save Venice Inc	150 00
	09/22/2014	The Cambridge Arts Council Fund	250 00
	09/22/2014	National Museum of Women in the Arts	125 00
	09/22/2014	Central Square Theater	2,000 00
	09/22/2014	Project Step	200 00
	09/22/2014	Addison Gallery Of American Art	350 00
	09/22/2014	BalletRox	100 00
	09/22/2014	Boston Landmarks Orchestra	2,000 00
	09/22/2014	Coolidge Corner Theatre Foundation	250 00
	09/22/2014	Decordova Museum & Sculpture Park	2,500 00
	09/22/2014	Fuller Craft Museum	1,000 00
	09/22/2014	Harvard University Art Museums	10,000 00
	09/22/2014	Mass College Of Art & Design Foundation	2,500 00
	09/22/2014	Maud Morgan Art Center	2,000 00
	09/22/2014	Peterborough Players	350 00
	09/22/2014	Playwrights' Workshop	1,000 00
	09/22/2014	School Of The Museum Of Fine Arts	1,000 00
	09/22/2014	Sharon Arts Center	250 00
	09/22/2014	The MacDowell Colony	1,500 00
	09/22/2014	WGBH	2,500 00
	09/22/2014	Metropolitan Museum Of Art	250 00
	09/22/2014	The Boston Athenaeum	320 00
	09/22/2014	The Boston Athenaeum	2,000 00
	09/22/2014	The MacDowell Colony	500.00
	09/22/2014	Peterborough Players	500 00
	09/22/2014	Berklee College of Music	500 00
	09/22/2014	The Boston Conservatory	250 00
	09/22/2014	The Cantata Singers	250 00
	09/22/2014	Huntington Theatre Company	500 00
	09/22/2014	St Botolph Club Foundation	250 00
	09/22/2014	Peabody Essex Museum	350 00
	09/22/2014	Shakespeare & Co	200 00
	09/22/2014	Emmanuel Music	250 00
	09/22/2014	Nurtury	1,000 00
	09/22/2014	Cambodian Living Arts	250 00
	09/22/2014	The Society Of Arts & Crafts	250 00
	09/22/2014	King's Chapel Concert Series	100 00

	09/22/2014	Artists For Humanity	250 00
	09/22/2014	Boston Symphony Orchestra	2,000 00
	09/22/2014	World Music Crash Arts	250 00
	09/22/2014	BSA Foundation	500 00
	09/22/2014	Central Square Theater	250 00
_	09/22/2014	Royall House and Slave Quarters	50 00
	09/22/2014	Indian Hill Music	250 00
	09/22/2014	New England Conservatory	500 00
	11/19/2014	Moma	100 00
	11/24/2014	The Art Connection	500 00
	11/24/2014	Boston Symphony Orchestra	3,000 00
	11/24/2014	Isabella Stewart Gardner Museum	5,000 00
	11/24/2014	Harvard University Art Museums	5,000 00
	11/24/2014	Boston Philharmonic Orchestra	500 00
	11/24/2014	Canadian Art Foundation	100 00
	11/24/2014	Community Supported Film	100 00
	11/24/2014	Cooperative Artists Institute	500 00
_	11/24/2014	Danforth Museum Of Art	500 00
	11/24/2014	Project Step	300 00
	11/24/2014	Walnut Hill School for the Arts	250 00
	11/24/2014	Charles River Conservancy	5,000 00
	11/24/2014	Crwa	200 00
	11/24/2014	Emerald Necklace Conservancy	250 00
	11/24/2014	Friends Of Mt Auburn Cemetery	1,500 00
	11/24/2014	National Trust For Historic Preservation	200 00
	11/24/2014	The Boston Commmitte of The GCA	100 00
_	11/24/2014	NRDC	2,500 00
	11/24/2014	Beatrix Farrand Garden Association	50 00
	11/24/2014	Trustees Of Reservations	250 00
	11/24/2014	Arnold Arboretum Of Harvard University	200 00
	11/24/2014	The Nature Conservancy	1,000 00
	11/24/2014	Sierra Club	300 00
	11/24/2014	Conservation Law Foundation	150 00
	11/24/2014	National Parks Conservation Assoc, NPCA	100 00
	11/24/2014	The Madoo Conservancy	100 00
	11/24/2014	Amnesty International	2,500 00
	11/24/2014	Wand	500 00
	11/24/2014	Ploughshares Fund	7,500 00
	11/24/2014	Ippnw	1,000 00
	11/24/2014	Physicians For Human Rights	1,000 00
	11/24/2014	American Friends Service Committee	300 00
	11/24/2014	Amnesty International	500 00
	11/24/2014	Physicians For Human Rights	1,000 00
	11/24/2014	Planned Parenthood League Of Mass	25,000 00

_			
_	11/24/2014	IPPF/WHR	500 00
	12/10/2014	Horizons for Homeless Children	500 00
	12/17/2014	Horizons for Homeless Children	125 00
	12/17/2014	South Africa Partners	2,500 00
	12/17/2014	Asylum Access	10,000 00
	12/17/2014	New England International Donors	1,200 00
	12/17/2014	Mercy Corps	10,000 00
	12/17/2014	MIRA Coalition	5,000 00
	12/17/2014	Save The Children Federation	5,000 00
	12/17/2014	USA for UNHCR	5,000 00
	12/17/2014	Us Fund For Unicef	5,000 00
	12/17/2014	USA for UNHCR	2,500 00
	12/17/2014	Cultural Survival	150 00
	12/17/2014	RefugePoint - Mapendo International	25,000 00
	12/17/2014	St Boniface Haiti Foundation	1,000 00
	12/17/2014	Accion	250 00
	12/17/2014	Heifer International	500 00
	12/17/2014	IRC	25,000 00
	12/17/2014	Us Fund For Unicef	5,000 00
	12/17/2014	Us Fund For Unicef	5,000 00
	12/17/2014	Save The Children Federation	2,500 00
	12/17/2014	USA for UNHCR	1,000 00
	12/17/2014	Asylum Access	5,000 00
	12/17/2014	Iraqı Refugee Assistance Project	15,000 00
	12/17/2014	MIRA Coalition	1,000 00
	12/17/2014	KıckStart	3,000 00
	12/17/2014	CARE	200 00
	12/17/2014	USA for UNHCR	1,500 00
_	Total		547,420.00