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2044

2014

OMB No 1545-0052

Open to Public

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.

Open to Public Inspection

| For | cale | ndar year 2014, or tax year beginning 01-0 | 01-2014 | , a | nd ending 1 | 2-31-2014 | | | | |
|----------------|-----------|--|------------------------------------|------------------|--------------------------|---|--|--|--|--|
| | | indation J & GILDA F STRAZZULA FOUNDATION | | | A Employer id | entification numb | er | | | |
| IMA | VI I HEVV | J & GILDA F STRAZZOLA FOUNDATION | | | 04-6910814 | | | | | |
| Num | ber and | street (or P O box number if mail is not delivered to street address: |) Room/suite | | B Telephone nu | mber (see instructio | ns) | | | |
| | | WATER DRIVE SUITE 210 | , | | (781) 914-3400 | | | | | |
| Cıtv | or town | , state or province, country, and ZIP or foreign postal code | | | C If exemption | application is pendin | a, check here 🕨 🗀 | | | |
| | | MA 01880 | | | <u>r</u> | , | , , , , | | | |
| <u></u> | anck a | Il that apply Initial return Initial return of a | former public charity | , | B.4 [| | | | | |
| G C | іеск а | Final return Amended return | Torriler public charity | , | _ | ganizations, check h ganizations meeting | | | | |
| | | Address change Name change | | | test, chec | k here and attach co | mputation | | | |
| | | pe of organization Section 501(c)(3) exempt priva | | | | indation status was i n 507(b)(1)(A), chec | | | | |
| | | 4947(a)(1) nonexempt charitable trust Other taxa | | | | | | | | |
| | | ret value of all assets at end From Part II, col. (c), State of all assets at end To ther (specify) | Cash I Acci | rual | | ation is in a 60-mont n 507(b)(1)(B), chec | | | | |
| | | \$ 985,524 (Part I, column (d) must | be on cash basis.) | | | | | | | |
| 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) ¹ | Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) | | | |
| | 1 | Contributions, gifts, grants, etc , received (attach | | | | | | | | |
| | | schedule) | | | | | | | | |
| | 2 | Check ► 🔽 if the foundation is not required to attach | | | | | | | | |
| | | Sch B | | | | | | | | |
| | 3 | Interest on savings and temporary cash investments | 10 | | 10 | | | | | |
| | 4 | Dividends and interest from securities | 11,389 | | 11,389 | | | | | |
| | 5a | Gross rents | | | | | | | | |
| Ф | b 6a | Net rental income or (loss) Net gain or (loss) from sale of assets not on line 10 | 89,128 | | | | | | | |
| | b | Gross sales price for all assets on line 6a | | | | | | | | |
| Revenue | | 179,946 | | | | | | | | |
| Œ | 7 | Capital gain net income (from Part IV, line 2) | | | 89,128 | | | | | |
| | 8 | Net short-term capital gain | | | | | | | | |
| | 9 | Income modifications | | | | | | | | |
| | 10a | Gross sales less returns and allowances | | | | | | | | |
| | ь | Less Cost of goods sold | | | | | | | | |
| | c | Gross profit or (loss) (attach schedule) | | | | | | | | |
| | 11 | Other income (attach schedule) | | | | | | | | |
| | 12 | Total. Add lines 1 through 11 | 100,527 | | 100,527 | | | | | |
| | 13 | Compensation of officers, directors, trustees, etc | 10,000 | | 500 | | 9,500 | | | |
| v) | 14 | Other employee salaries and wages | | | | | | | | |
| 7Se | 15 | Pension plans, employee benefits | | | | | | | | |
| Expenses | 16a b | Accounting fees (attach schedule) | | | | | | | | |
| | _ | Other professional fees (attach schedule) | | | | | | | | |
| Administrative | 17 | Interest | | | | | | | | |
| tra. | 18 | Taxes (attach schedule) (see instructions) | % 143 | | 0 | | 0 | | | |
| Ē | 19 | Depreciation (attach schedule) and depletion | | | | | | | | |
| 튿 | 20 | Occupancy | | | | | | | | |
| Δ 4 | 21 | Travel, conferences, and meetings | | | | | ļ | | | |
| ä | 22 | Printing and publications | 84 | | 0 | | 0 | | | |
| Ē | 23 | Other expenses (attach schedule) | | | | | | | | |
| rati | 24 | Total operating and administrative expenses. Add lines 13 through 23 | 10,227 | | 500 | | 9,500 | | | |
| Operating and | 25 | Contributions, gifts, grants paid | 47,000 | | 500 | | 47,000 | | | |
| 0 | 26 | Total expenses and disbursements. Add lines 24 and | 47,000 | | | | 47,000 | | | |
| | | 25 | 57,227 | | 500 | | 56,500 | | | |
| | 27 | Subtract line 26 from line 12 | | | | | | | | |
| | a | Excess of revenue over expenses and disbursements | 43,300 | | | | | | | |
| | b | Net investment income (if negative, enter -0-) | | | 100,027 | | | | | |
| | С | Adjusted net income (If negative, enter -0 -) | | | | | I | | | |

| Da | rt II | Balance Sheets Attached schedules and amounts in the description column | Beginning of year | End of | year |
|--------------|-------|---|------------------------|------------------|-----------------------|
| | | Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions) | (a) Book Value | (b) Book Value | (c) Fair Market Value |
| | 1 | Cash—non-interest-bearing | 562,426 | 9,778 | 9,778 |
| | 2 | Savings and temporary cash investments | | 686,767 | 686,767 |
| | 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 🟲 | | | |
| ا ع | 8 | Inventories for sale or use | | | |
| Sets Sets | 9 | Prepaid expenses and deferred charges | | | |
| ξ. | 10a | Investments—U S and state government obligations (attach schedule) | | | |
| | b | Investments—corporate stock (attach schedule) | 283,709 | 192,890 | 288,979 |
| | С | Investments—corporate bonds (attach schedule) | | | _ |
| | 11 | Investments—land, buildings, and equipment basis | | | |
| | | Less accumulated depreciation (attach schedule) | | | |
| | 12 | Investments—mortgage loans | | | |
| | | Investments—other (attach schedule) | | | |
| | 14 | Land, buildings, and equipment basis | | | _ |
| | | Less accumulated depreciation (attach schedule) | | | |
| | 15 | Other assets (describe 🟲) | | | |
| | 16 | Total assets (to be completed by all filers—see the | | | |
| | 10 | instructions Also, see page 1, item I) | 846,135 | 889,435 | 985,524 |
| \dashv | 17 | Accounts payable and accrued expenses | | , | |
| | 18 | Grants payable | | | |
| <u> 8</u> | 19 | Deferred revenue | | | |
| abilities | 20 | Loans from officers, directors, trustees, and other disqualified persons | | | |
| 횽 | 21 | Mortgages and other notes payable (attach schedule) | | | |
| ا تــ | | Other liabilities (describe | | | |
| | 22 | Total liabilities (add lines 17 through 22) | 0 | 0 | |
| | 23 | | Ů, | | |
| ري اي | | Foundations that follow SFAS 117, check here | | | |
| Balance | | and complete lines 24 through 26 and lines 30 and 31. | | | |
| 흸 | 24 | Unrestricted | | | |
| ĕ۱ | 25 | Temporarily restricted | | | |
| Fund | 26 | Permanently restricted | | | |
| 屲 | | Foundations that do not follow SFAS 117, check here | | | |
| ১ | | and complete lines 27 through 31. | | | |
| Assets | 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 | 846,135 | 889,435 | |
| ž | 30 | Total net assets or fund balances (see instructions) | 846,135 | 889,435 | |
| | 31 | Total liabilities and net assets/fund balances (see instructions) | 846,135 | 889,435 | |
| Pa | rt II | 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 aç | jree | |
| | | , | | | 846,135 |
| 2 | | Enter amount from Part I, line 27a | | 2 | 43,300 |
| 3 | | Other increases not included in line 2 (itemize) | | 3 | 0 |
| 4 | | Add lines 1, 2, and 3 | | 4 | 889,435 |
| 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)—P | art II, column (b), lı | ne 30 . 6 | 889,435 |

| Parti | 0-PF (2014) | nd Losses for Tax on Inve | stmont Theome | | | Page 3 |
|--|--|---|---|---|--|---|
| | (a) List and describe the | he kınd(s) of property sold (e g , re use, or common stock, 200 shs M | al estate, | (b) How acquired P—Purchase D—Donation | (c) Date acquired (mo , day, yr) | (d) Date sold (mo , day, yr) |
| 1a | See Additional Data Ta | able | | D—Dollation | | |
| b | | | | | | |
| | | | | | | |
| d | | | | | | |
| | | | | | | |
| е | | (6) Daniel Land | 4 (-) () | | 100 000 | /1 > |
| (e |) Gross sales price | (f) Depreciation allowe (or allowable) | 1 1-7 | t or other basis pense of sale | | or (loss)) mınus (g) |
| а | See Additional Data Ta | able | · | | | |
| b | | | | | | |
| С | | | | | | |
| d | | | | | | |
| <u> </u> | | | | | | |
| | mnlete only for assets sh | nowing gain in column (h) and owne | d by the foundation | n on 12/31/69 | (I) Gains (Col | (h) gain minus |
| | | (j) Adjusted basis | · | cess of col (i) | | less than -0-) or |
| (i) | FM V as of 12/31/69 | as of 12/31/69 | | col (j), if any | | om col (h)) |
| а | See Additional Data Ta | able | | | | |
| b | | | | | | |
| С | | | | | | |
| d | | | | | | |
| e | | | | | | |
| 3 | • | gain or (loss) as defined in sectio art I , line 8 , column (c) (see instru | | | | |
| | , , , , , , , , , , , , , , , , , , , | | | · ·) | 3 | |
| Part \ | | nder Section 4940(e) for R | educed Tax or | Net Investme | | |
| | V Qualification Ur | nder Section 4940(e) for R | | | nt Income | |
| or opt | Qualification Unional use by domestic prion 4940(d)(2) applies, le | ivate foundations subject to the se ave this part blank | ection 4940(a) tax | on net investment | nt Income | |
| or opt f section f section f "Yes," | Qualification Unional use by domestic prion 4940(d)(2) applies, le foundation liable for the the foundation does not | ivate foundations subject to the se ave this part blank section 4942 tax on the distribut: qualify under section 4940(e) Do | ection 4940(a) tax able amount of any o not complete this | on net investment year in the base pe part | nt Income Income) eriod? | Γ Yes Γ Νο |
| For opt f section Vas the f "Yes,' | Qualification Unional use by domestic prion 4940(d)(2) applies, le foundation liable for the the foundation does not | ivate foundations subject to the se ave this part blank section 4942 tax on the distribute | ection 4940(a) tax able amount of any o not complete this | on net investment year in the base pe part | nt Income Income) eriod? | ┌ Yes ┌ No |
| f section f sect | Qualification Unional use by domestic prion 4940(d)(2) applies, le foundation liable for the the foundation does not | ivate foundations subject to the se ave this part blank section 4942 tax on the distribut: qualify under section 4940(e) Do | ection 4940(a) tax able amount of any o not complete this | on net investment year in the base pe part ore making any ent | nt Income Income) eriod? | n ratio |
| f section f sect | Qualification Unional use by domestic prion 4940(d)(2) applies, less foundation liable for the the foundation does not the ter the appropriate amount (a) | ivate foundations subject to the seave this part blank section 4942 tax on the distribute qualify under section 4940(e) Do nt in each column for each year, so (b) | able amount of any o not complete this ee instructions before | on net investment year in the base pe part ore making any ent | nt Income Income) Priod? ries (d) Distribution | n ratio |
| f section f sect | Qualification Unional use by domestic prion 4940(d)(2) applies, le foundation liable for the 'the foundation does not ter the appropriate amount (a) period years Calendar or tax year beginning in) | ave this part blank section 4942 tax on the distribute qualify under section 4940(e) Do nt in each column for each year, so (b) Adjusted qualifying distributions | able amount of any o not complete this ee instructions before | on net investment year in the base pe part ore making any ent | nt Income Income) Priod? ries (d) Distribution | n ratio by col (c)) |
| f section f sect | Qualification Unional use by domestic prion 4940(d)(2) applies, le foundation liable for the the foundation does not the appropriate amount (a) period years Calendar or tax year beginning in) | ave this part blank section 4942 tax on the distribute qualify under section 4940(e) Do nt in each column for each year, so (b) Adjusted qualifying distributions | able amount of any o not complete this ee instructions before | year in the base per part ore making any ent entable-use assets | nt Income Income) Priod? ries (d) Distribution | n ratio by col (c)) 0 058609 |
| For opt section as the "Yes," 1 Ent Base | Qualification Unional use by domestic prion 4940 (d)(2) applies, less foundation liable for the the foundation does not the ter the appropriate amount (a) period years Calendar or tax year beginning in) 2013 2012 2011 2010 | ave this part blank section 4942 tax on the distribute qualify under section 4940(e) Do nt in each column for each year, so (b) Adjusted qualifying distributions 54,000 52,000 55,000 | able amount of any o not complete this ee instructions before | year in the base perpart ore making any ent ritable-use assets 921,361 973,980 980,466 1,020,770 | nt Income Income) Priod? ries (d) Distribution | n ratio by col (c)) 0 058609 0 053389 0 056096 0 053881 |
| For opt Factor F | Qualification Unional use by domestic prional use by domestic prion 4940(d)(2) applies, legion 4940(d)(d)(d)(d)(d)(d)(d)(d)(d)(d)(d)(d)(d)(| ave this part blank section 4942 tax on the distribute qualify under section 4940(e) Do nt in each column for each year, so (b) Adjusted qualifying distributions 54,000 52,000 55,000 60,000 | able amount of any o not complete this ee instructions before (c) Net value of noncha | year in the base per part ore making any ent nitable-use assets 921,361 973,980 980,466 | nt Income Income) Priod? ries (d) Distribution (col (b) divided | 0 058609 0 053389 0 056096 0 053881 0 055924 |
| sections sec | Qualification Unional use by domestic prion 4940 (d)(2) applies, less foundation liable for the the foundation does not the tree appropriate amount (a) period years Calendar or tax year beginning in) 2013 2012 2011 2010 2009 Total of line 1, column | ave this part blank section 4942 tax on the distribute qualify under section 4940(e) De nt in each column for each year, se (b) Adjusted qualifying distributions 54,000 52,000 55,000 60,000 (d) | able amount of any o not complete this ee instructions before Net value of noncha | year in the base perpart ore making any ent ntable-use assets 921,361 973,980 980,466 1,020,770 1,072,893 | nt Income Income) Priod? ries (d) Distribution | 0 058609 0 053389 0 056096 0 053881 0 055924 |
| section options section (as the section of the sect | Qualification Unional use by domestic print on 4940 (d)(2) applies, less foundation liable for the the foundation does not the foundation does not the foundation does not the appropriate amound (a) period years Calendar or tax year beginning in) 2013 2012 2011 2010 2009 Total of line 1, column A verage distribution rathe number of years the | ave this part blank section 4942 tax on the distribute qualify under section 4940(e) De nt in each column for each year, se (b) Adjusted qualifying distributions 54,000 52,000 55,000 60,000 (d) | able amount of any o not complete this ee instructions before Net value of noncha | year in the base perpart ore making any ent nitable-use assets 921,361 973,980 980,466 1,020,770 1,072,893 e 2 by 5, or by rs | nt Income | n ratio by col (c)) 0 058609 0 053389 0 056096 0 053881 0 055924 0 277899 |
| section options section (as the "Yes," 1 Entire Base year (co | Qualification Unional use by domestic print on 4940(d)(2) applies, less foundation liable for the the foundation does not the foundation does not the er the appropriate amount (a) period years Calendar for tax year beginning in) 2013 2012 2011 2010 2009 Total of line 1, column A verage distribution rate the number of years the Enter the net value of responsible for the service of the ser | ave this part blank section 4942 tax on the distribute qualify under section 4940(e) Do nt in each column for each year, so (b) Adjusted qualifying distributions 54,000 52,000 55,000 60,000 (d) | able amount of any o not complete this ee instructions before (c) Net value of noncha Vide the total on line if less than 5 years from Part X, line 5 | year in the base perpart ore making any ent intable-use assets 921,361 973,980 980,466 1,020,770 1,072,893 e 2 by 5, or by rs | nt Income | n ratio by col (c)) 0 058609 0 053389 0 056096 0 053881 0 055924 0 277899 |
| section options section (as the section of the sect | Qualification Unional use by domestic prion 4940 (d)(2) applies, legion 4940 (d)(2) ap | ave this part blank section 4942 tax on the distribute qualify under section 4940(e) De nt in each column for each year, se (b) Adjusted qualifying distributions 54,000 52,000 55,000 60,000 (d) | able amount of any o not complete this ee instructions before the value of nonchate the total on line if less than 5 years from Part X, line 5 | year in the base perpart ore making any ent ritable-use assets 921,361 973,980 980,466 1,020,770 1,072,893 e 2 by 5, or by rs | nt Income | n ratio by col (c)) 0 058609 0 053389 0 056096 0 053881 0 055924 0 277899 0 055580 997,259 |
| For opt Section Sectio | Qualification Unional use by domestic print on 4940 (d)(2) applies, less foundation liable for the the foundation does not the foundation does not the foundation does not the foundation does not the ser the appropriate amount (a) period years Calendar for tax year beginning in) 2013 2012 2011 2010 2009 Total of line 1, column A verage distribution rathe number of years the Enter the net value of Multiply line 4 by line 3 Enter 1% of net investigation of the service o | ave this part blank section 4942 tax on the distribute qualify under section 4940(e). Do not in each column for each year, so (b) Adjusted qualifying distributions 54,000 52,000 55,000 60,000 (d) | able amount of any o not complete this ee instructions before the value of nonchard the total on line if less than 5 years from Part X, line 5 to 57b). | year in the base perpart ore making any ent ritable-use assets 921,361 973,980 980,466 1,020,770 1,072,893 e 2 by 5, or by rs | nt Income | 0 055580 0 055580 0 055580 0 055924 0 055580 997,255 |
| F section /as the section /as | Qualification Unional use by domestic print on 4940 (d)(2) applies, less foundation liable for the the foundation does not the foundation does not the foundation does not the foundation does not the ser the appropriate amount (a) period years Calendar for tax year beginning in) 2013 2012 2011 2010 2009 Total of line 1, column A verage distribution rathe number of years the Enter the net value of Multiply line 4 by line 3 Enter 1% of net investigation of the service o | ave this part blank section 4942 tax on the distribute qualify under section 4940(e) De nt in each column for each year, se (b) Adjusted qualifying distributions 54,000 52,000 55,000 60,000 (d) | able amount of any o not complete this ee instructions before the value of nonchard the total on line if less than 5 years from Part X, line 5 to 57b). | year in the base perpart ore making any ent ritable-use assets 921,361 973,980 980,466 1,020,770 1,072,893 e 2 by 5, or by rs | nt Income | 0 058609 0 053389 0 053381 |

| | 990-PF (2014) | | | age 4 |
|--------|---|--------|-----|--------------|
| | Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the inst | ructio | ns) | |
| 1a | Exempt operating foundations described in section 4940(d)(2), check here ► ☐ and enter "N/A" | | | |
| | 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 | | | 1,000 |
| | here F and enter 1% of Part I, line 27b | | | |
| С | 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-) | | | 0 |
| 3 | Add lines 1 and 2 | | | 1,000 |
| 4 | Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others | | | |
| _ | enter -0-) Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0 5 | | | 0 |
| 5 6 | Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0 | | | 1,000 |
| a | 2014 estimated tax payments and 2013 overpayment credited to 2014 6a | | | |
| 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 | | | 0 |
| 8 | Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached. | | | 2 |
| 9 | Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed | | | 1,002 |
| 10 | Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 | | | |
| 11 | Enter the amount of line 10 to be Credited to 2015 estimated tax | | | |
| | t VII-A Statements Regarding Activities | | | |
| 1a | During the tax year, did the foundation attempt to influence any national, state, or local legislation or did | | Yes | No |
| | ıt partıcıpate or ıntervene ın 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. | | | |
| С | 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 \blacktriangleright \$0 (2) On foundation managers \blacktriangleright \$0 | | | |
| е | Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed | | | |
| | on foundation managers 🕨 \$0 | | | |
| 2 | Has the foundation engaged in any activities that have not previously been reported to the IRS? | 2 | | No |
| | If "Yes," attach a detailed description of the activities. | | | |
| 3 | Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles | _ | | |
| 4- | 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 | | NI- |
| 5 | Was there a liquidation, termination, dissolution, or substantial contraction during the year? | 5 | | No |
| 6 | If "Yes," attach the statement required by General Instruction T. Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either | | | |
| U | By language in the governing instrument, or | 1 | | |
| | 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 | | No |

| | Continued) | | <u>'</u> | age c |
|------------|---|------------|----------|--------------|
| 11 | Tt VII-A Statements Regarding Activities (continued) At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the | | | |
| 11 | 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 | | | 140 |
| 12 | advisory privileges? If "Yes," attach statement (see instructions) | 12 | | No |
| 12 | | 13 | Yes | 140 |
| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? | | res | <u> </u> |
| | Website address ►N/A | | | |
| 14 | The books are in care of ►PAUL R JOHNSON CPA Telephone no ►(781) | 914- | 3400 | |
| | Located at ► 101 EDGEWATER DRIVE SUITE 210 WAKEFIELD MA ZIP+4 ► 01880 | | | |
| 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 | | | |
| 16 | At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over | | Yes | No |
| | a bank, securities, or other financial account in a foreign country? | 16 | 103 | No |
| | See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial | <u> </u> | | |
| | Accounts (FBAR) If "Yes", enter the name of the foreign country | | | |
| Pa | 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 |
| 1 a | 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? Yes V No | | | |
| | (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes V 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)? | | | |
| | (6) Agree to pay money or property to a government official? (Exception. Check "No" | | | |
| | ıf 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 | | | |
| Ь | 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 | | <u> </u> |
| | 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 | | 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)) | | | |
| 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 | | | |
| Ь | 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 | | - |
| 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 | | | |
| За | Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at | | | |
| | any time during the year? | | | 1 |
| b | If "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation | | | 1 |
| | or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved | | | 1 |
| | by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) | | | 1 |
| | the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine | 2 ⊩ | | 1 |
| _ | If the foundation had excess business holdings in 2014.). | 3b | | <u> </u> |
| 4a | Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? | 4a | | No |
| Ь | 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? | AL. | | N |
| | - Chantaple pulpose that had not been removed holl leopaldy before the lifst day of the tax year beginning in 2014? | 4b | 1 | l No |

| _ | rt VIII-B Statements Rega | rdin | a Activities for | · Wh | nich Form 4720 | Mav | Be Required (cont | inue | d) | <u></u> | age u |
|---------|--|--------|-------------------------------------|--------|----------------------------|--------|--|---------|------------------|---------|--------------|
| 5a | During the year did the foundation | | _ | | | | | | Ĭ | | |
| | (1) Carry on propaganda, or othe | | | | ıslatıon (section 49 | 45(e |))? | - No | | | |
| | (2) Influence the outcome of any | | | | | | | | | | |
| | on, directly or indirectly, any | • | • | • | • • | | • | - No | | | |
| | (3) Provide a grant to an individu | | | | | | ☐ Yes ☐ | | | | |
| | (4) Provide a grant to an organiza | | | | | scrib | · | | | | |
| | in section 4945(d)(4)(A)? (se | | | | | | | - No | | | |
| | (5) Provide for any purpose other | | | | | | , | | | | |
| | educational purposes, or for t | | | | | | | - No | | | |
| ь | If any answer is "Yes" to 5a(1)-(| | | | | | | | | | |
| | Regulations section 53 4945 or i | | | | | | | | 5b | | |
| | Organizations relying on a curren | | | | | | | | | | |
| c | If the answer is "Yes" to question | | | | | | | | | | |
| • | tax because it maintained expend | | | | | | | - No | | | |
| | If "Yes," attach the statement requ | | | | | • | , 165 , | 110 | | | |
| 6a | Did the foundation, during the year | | | | | nrar | nume on | | | | |
| Va | a personal benefit contract? | - | | | | | | - No | | | |
| h | Did the foundation, during the year | | | | | | | | 6b | | No |
| U | If "Yes" to 6b, file Form 8870. | ai, pa | y premiums, unecci | y 01 1 | nunectry, on a perso | , iiai | benefit contract | • | OD | | 140 |
| 7- | • | vac th | a faundation a part | , to . | nrohibited tay chal | tor t | ransaction? TYes F | - No | | | |
| 7a ե | At any time during the tax year, v If yes, did the foundation receive | | | | | | · | | 7b | | |
| | | | | | | | n Managers, Highly | | l | lovo | <u> </u> |
| Pai | and Contractors | COII | icers, Directors | , II | ustees, i ouilde | itioi | i Managers, mgmy | raiu | СШР | loye | cs, |
| 1 | List all officers, directors, trustee | s, fou | ndation managers a | nd t | heir compensation (| see i | nstructions). | | | | |
| | | | Title, and average | ٠, | c) Compensation | | (d) Contributions to | (e) E | xpens | e acc | ount. |
| | (a) Name and address | | hours per week voted to position | (: | If not paid, enter -0-) | | mployee benefit plans deferred compensation | | her all | | • |
| PAUL | R JOHNSON | _ | STEE | | 10,000 | una | 0 | | | | 0 |
| | EDGEWATER DRIVE SUITE 210 | 6 00 | | | 10,000 | | Ŭ | | | | U |
| | EFIELD, MA 01880 | | | | | | | | | | |
| 2 | Compensation of five highest-paid | l emp | loyees (other than | thos | e included on line 1– | -see | instructions). If none, er | nter "N | ONE. | • | |
| | | | (b) Title, and aver | ane | | | (d) Contributions to | | | | |
| (a) | Name and address of each employ | yee | hours per week | _ | (c) Compensation | n | employee benefit | | xpens her all | | |
| | paid more than \$50,000 | | devoted to positi | on | | | plans and deferred compensation | 00 | ilei ali | Owalic | .65 |
| NON | E | | | | | | · | | | | |
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| | | | | | | | | | | | |
| Tota | I number of other employees paid o | ver \$ | 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 serv | ices (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 | | | | | | | |
| | | | | | | | |
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| | | | | | | | |
| Total number of others receiving over \$50,000 for professional servi | ces | 0 | | | | | |
| Part IX-A Summary of Direct Charitable Activities | | | | | | | |
| List the foundation's four largest direct chantable activities during the tax year. Inclu | do relevant statistical information such as the number of | | | | | | |
| organizations and other beneficiaries served, conferences convened, research paper | | Expenses | | | | | |
| 1 | | | | | | | |
| 2 | | | | | | | |
| 3 | | | | | | | |
| 4 | | | | | | | |
| Part IX-B Summary of Program-Related Investmen | | . . | | | | | |
| Describe the two largest program-related investments made by the foundation d | luring the tax year on lines 1 and 2 | A mount | | | | | |
| 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.) Fair market value of assets not used (or held for use) directly in carrying out charitable, etc. 1 purposes 416,363 1a 1h 596.079 1c 1d 1.012.442 Reduction claimed for blockage or other factors reported on lines 1a and 1e 2 2 3 3 Subtract line 2 from line 1d. 1.012.442 Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see 4 15.187 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V. line 4. 5 997.255 5 49.863 **Distributable Amount** (see instructions) (Section 4942(1)(3) and (1)(5) private operating foundations and Part XT certain foreign organizations check here $\blacktriangleright \Gamma$ and do not complete this part.) 49.863 1 Tax on investment income for 2014 from Part VI, line 5. 1.000 2a Income tax for 2014 (This does not include the tax from Part VI). . . 2c 1.000 3 3 48.863 4 Λ 4 5 5 48.863 Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . 7 7 48.863 Part XIII Oualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes 1 Expenses, contributions, gifts, etc —total from Part I, column (d), line 26. 1a 56.500 1b 0 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc. 2 2 3 Amounts set aside for specific charitable projects that satisfy the За. 3b 4 Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4 56,500 4 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment 1,000 55,500 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

| | olidistributed fricollie (see | ii isti u | ctions) | | | |
|---|---|----------------|----------------------|-----------------------------------|--------------------|--|
| | | | (a) Corpus | (b) Years prior to 2013 | (c) 2013 | (d) 2014 |
| 1 | Distributable amount for 2014 from Part XI, line | _ | Сограз | rears prior to 2015 | 2013 | 48,863 |
| | Undistributed income, if any, as of the end of 20 | | | | | |
| | Enter amount for 2013 only | ′ - ¬ | | | C | |
| | Total for prior years 20 | ⊢ | | 0 | | |
| | Excess distributions carryover, if any, to 2014 | — ⊦ | | | | |
| | From 2009 | 6,388 | | | | |
| | | 4,132 | | | | |
| | From 2011 | 6,130 | | | | |
| | | 3,595 | | | | |
| | From 2013 | 8,040 | | | | |
| | Total of lines 3a through e | | 28,285 | | | |
| | Qualifying distributions for 2014 from Part | | | | | |
| - | XII, line 4 🕨 \$ 56,500 | | | | | |
| а | Applied to 2013, but not more than line 2a | | | | C |) |
| | Applied to undistributed income of prior years | | | 0 | | |
| | (Election required—see instructions). | . L | | | | |
| c | Treated as distributions out of corpus (Election | | 0 | | | |
| | required—see instructions) | · · | | | | |
| d | Applied to 2014 distributable amount | · L | | | | 48,863 |
| е | Remaining amount distributed out of corpus | L | 7,637 | | | |
| 5 | Excess distributions carryover applied to 2014 | L | 0 | | | 0 |
| | (If an amount appears in column (d), the | | | | | |
| | same amount must be shown in column (a).) | | | | | |
| 6 | Enter the net total of each column as indicated below: | | | | | |
| 2 | Corpus Add lines 3f, 4c, and 4e Subtract line 5 | . | 35,922 | | | |
| | Prior years' undistributed income Subtract | ` ⊢ | 33,522 | | | |
| D | 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) | | | 0 | | |
| _ | tax has been previously assessed | · | | | | 1 |
| d | Subtract line 6c from line 6b Taxable amount | | | 0 | | |
| _ | —see instructions | • - | | | | |
| ٠ | 4a from line 2a Taxable amount—see | | | | | |
| | instructions | . | | | C | |
| f | Undistributed income for 2014 Subtract | | | | | |
| | lines 4d and 5 from line 1 This amount must | | | | | 0 |
| _ | be distributed in 2015 | · - | | | | |
| / | Amounts treated as distributions out of corpus to satisfy requirements imposed by | | | | | |
| | section $170(b)(1)(F)$ or $4942(g)(3)$ (Election ma | av | | | | |
| | be required - see instructions) | | 0 | | | |
| 8 | Excess distributions carryover from 2009 not | | 6,388 | | | |
| | applied on line 5 or line 7 (see instructions) | · • _ | 0,388 | | | |
| 9 | Excess distributions carryover to 2015. | | 29,534 | | | |
| | Subtract lines 7 and 8 from line 6a | · • - | 29,334 | | | |
| | Analysis of line 9 | 4 122 | | | | |
| | Excess from 2010 | 4,132 6,130 | | | | |
| | Excess from 2011 Excess from 2012 | 3,595 | | | | |
| | | 8,040 | | | | |
| | 2.0000 110111 20101 1 1 1 | 7,637 | | | | |
| e | LACCOS HUIH ZUITE E E E | ., | | | | 1 |

Check here F 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

| Recipient | If recipient is an individual, show any relationship to any foundation manager | Foundation status of | Purpose of grant or contribution | A mount |
|--|--|-------------------------|-------------------------------------|---------|
| | or substantial contributor | recipient | | |
| a Paid during the year See Additional Data Table | any foundation manager or substantial contributor | recipient | contribution | |
| | | | | 47,00 |
| b Approved for future payment | | | | |
| | | | | |
| | | | 1 | |

| Form 990-F | | na Activitio | | | | Page 12 |
|-----------------------------------|--|-------------------------|-----------------------|-----------------------|--------------------|---|
| | Analysis of Income-Producions amounts unless otherwise indicated | | usiness income | Excluded by section | n 512, 513, or 514 | (e) |
| | n service revenue | (a) Business code | (b) A mount | (c) Exclusion code | (d) A mount | Related or exempt function income (See instructions) |
| | | | | | | |
| · | | | | | | |
| f | | | | | | |
| 2 Membe 3 Interes | and contracts from government agencies rship dues and assessments | | | 14 | 10 | |
| | nds and interest from securities | | | 14 | 11,389 | |
| a Debt- b Not de | financed property ebt-financed property | | | | | |
| proper | ital income or (loss) from personal ty | | | | | |
| 8 Gain or | nvestment income | | | 18 | 89,128 | |
| | ome or (loss) from special events profit or (loss) from sales of inventory | | | | | |
| | evenue a | | | | | |
| | | | | | | |
| | al Add columns (b), (d), and (e). | | (|) | 100,527 | C |
| 13 Total. A | Add line 12, columns (b), (d), and (e) orksheet in line 13 instructions to verify ca | | | 1 | .3 | 100,527 |
| Part XVI | Explain below how each activity for whic the accomplishment of the foundation's instructions) | h income is re | ported ın column (| (e) of Part XVI-A co | ontributed importa | |
| | | | | | | |
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| Part | -XVI | Noncharitable | | | | | sactions | s and H | keiationsnips | with | | | |
|---------------------|-------------|---|------------------------|-----------|---------------|---|---------------|------------|------------------------------|-----------------------------|-----------------|---------|-----|
| | | organization directly or i | ndırectly e | engage | ın any of | the following wi | | | | | | Yes | No |
| | | tions? | | | (-)(-) | ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,, | | , | | | | | |
| | | s from the reporting four | ndation to | a nonc | harıtable | exempt organiz | ation of | | | | | | |
| (1) | Cas | h | | | | | | | | | 1a(1) | | No |
| (2) | Oth | erassets | | | | | | | | | 1a(2) | | No |
| b Ot | her tra | ansactions | | | | | | | | | | | |
| (1) | Sale | s of assets to a noncha | rıtable exe | empt or | ganızatıo | n | | | | | 1b(1) | | No |
| (2) | Purc | chases of assets from a | noncharit | able ex | empt orga | anızatıon | | | | | 1b(2) | | No |
| (3) | Rent | tal of facilities, equipme | nt, or othe | rasset | ts | | | | | | 1b(3) | | No |
| (4) | Rein | nbursement arrangemer | nts | | | | | | | i i | 1b(4) | | No |
| (5) | Loar | ns or loan guarantees. | | | | | | | | | 1b(5) | | No |
| (6) | Perfo | rmance of services or n | nembershı | p or fur | ndraising | solicitations. | | | | | 1b(6) | | No |
| c Sh | arıng | of facilities, equipment, | maılıng lıs | ts, oth | er assets, | or paid employ | yees | | | | 1c | | No |
| of t | he go | swer to any of the above ods, other assets, or se ansaction or sharing arr | rvices giv | en by t | he reporti | ng foundation | If the foun | dation r | eceived Íess thai | n fair marke | et value | | |
| (a) Line | e No | (b) Amount involved | (c) Name | of nonch | narıtable exe | empt organization | (d) De | escription | of transfers, transact | tions, and sha | rıng arra | ngemer | nts |
| | | | | | | | | | | | | | |
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| des | cribe | undation directly or indi d in section 501(c) of th complete the following (a) Name of organizatio | ne Code (d schedule | | an section | | rın sectior | | | • • • • • ption of relation | | ıs F | No |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | 1 | | | | | | | | | | | | |
| Sign | the info | der penalties of perjury, best of my knowledge a ormation of which prepai | and belief, | ıt ıs tru | ie, correct | | | | | an taxpaye | | sed on | |
| Here | | ***** | | | | 2015-05-14 | b - | ***** | | return | preparer | | |
| | <u></u> | Signature of officer or t | rustee | | | Date | | Γıtle | , | | r) ? 🔽 <u>\</u> | ′es ┌ N | No |
| | | Print/Type preparer's PAUL R JOHNSON | name | Prepa | rer's Sıgn | ature | Date 2015- | 05-14 | Check if self- employed ▶ | PTIN P(| 01639 | 960 | |
| Paid Prep Use | arer | | R FERON | & CAR | UCCI LLF |) | | | Firm's EIN ► 20 | 0-3985540 | 5 | | |
| Only | | Firm's address ► 101 EDGEWATER DR MA 01880 | | E 210 | WA KEFI | ELD, | | | Phone no (781 | L)914-340 | 00 | | |

| m 990PF Part IV - Capita | l Gains and Losses for Ta | ax on Invest | ment Income | - Columns a - d | |
|--------------------------|--|---|--------------------------------------|----------------------------------|------------|
| | nd(s) of property sold (e g , real or common stock, 200 shs MLC | (b) How acquired P—Purchase D—Donation | (c) Date acquired (mo , day, yr) | (d) Date sold (mo , day, yr) | |
| 1,000 SHS BRISTOL MY | ERS SQUIBB | | Р | 2010-03-04 | 2014-03-31 |
| 500 SHS BRISTOL MYE | RS SQUIBB | | Р | 2010-03-04 | 2014-12-31 |
| 400 SHS COCA COLA | | | Р | 2011-02-03 | 2014-12-31 |
| 300 SHS HOME DEPOT | | Р | 2011-02-03 | 2014-12-31 | |
| 300 SHS MCDONALDS | | Р | 2010-03-04 | 2014-12-31 | |
| 200 SHS NEXTERA ENE | RGY | | Р | 2011-02-03 | 2014-12-31 |
| n 990PF Part IV - Capita | I Gains and Losses for Ta | ax on Invest | ment Income | - Columns e - h | |
| (e) Gross sales price | (f) Depreciation allowed (or allowable) | | or other basıs pense of sale | (h) Gain (e) plus (f) | |
| 51,881 | | | 24,572 | ! | 27,309 |
| 29,809 | | | 12,286 | | 17,523 |
| 16,978 | | | 12,619 | | 4,359 |
| 31,594 | | | 11,128 | | 20,466 |
| 28,216 | | | 19,104 | | 9,112 |
| 21.468 | | | 10.359 | | |

| 28,216 | | 19,104 | 9,112 | | | |
|---|--------------------------------------|--|--|--|--|--|
| 21,468 | | 11,109 | 10,359 | | | |
| Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - I | | | | | | |
| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 | | (I) Gains (Col (h) gain minus | | | | |
| (i) F M V as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of col (ı) over col (j), ıf any | col (k), but not less than -0-) or Losses (from col (h)) | | | |
| | | | 27,309 | | | |
| | | | 17,523 | | | |
| | | | 4,359 | | | |
| | | | 20,466 | | | |
| | | | 9.112 | | | |

10,359

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

| Recipient | If recipient is an individual, show any relationship to | Foundation status of | Purpose of grant or contribution | A mount |
|---|---|-------------------------|----------------------------------|---------|
| Name and address (home or business) | any foundation manager or substantial contributor | recipient | | |
| a Paid during the year | | | | |
| BETHANY COMM SERVICES INC 10-12 PHOENIX ROAD HAVERHILL, MA 01832 | | PC | ELDER AFFAIRS SUPPORT | 1,000 |
| BOSTON COLLEGE HIGH SCHOOL 159 MORRISSEY BOULEVARD BOSTON,MA 02125 | | PC | EDUCATIONAL SUPPORT | 1,000 |
| BROCKTON NEIGHBORHOOD HEALTH CENTER 63 MAIN STREET BROCKTON, MA 02301 | | PC | EDUCATIONAL SUPPORT | 1,000 |
| CHILDREN'S FRIEND AND FAMILY SERVICES 48 BRIDGE STREET SALEM,MA 01970 | | PC | FAMILY SUPPORT | 1,000 |
| COMMUNITY GIVING TREE TRITOWN COUNCIL ON YOUTH & FAMILY SERVICES 49 MAIN STREET TOPSFIELD, MA 01983 | | PC | EDUCATIONAL SUPPORT | 1,500 |
| DIMMOCK COMM FOUNDATION INC 55 DIMMOCK STREET ROXBURY, MA 02119 | | PC | AFTER SCHOOL PROGRAMS | 3,000 |
| EAST BOSTON PROGRAM CTR - YMCA 944 BENNINGTON STREET EAST BOSTON,MA 02028 | | PC | AFTER SCHOOL PROGRAMS | 3,500 |
| GERMAINE LAWRENCE INC 18 CLAREMONT AVENUE ARLINGTON, MA 02476 | | PC | EDUCATIONAL SUPPORT | 1,000 |
| HARTWICK COLLEGE J TERM - INNER CITY STUDENTS PO BOX 4020 ONEONTA,NY 13820 | | PC | EDUCATIONAL SUPPORT | 5,000 |
| LAWRENCE COMMUNITY WORKS 168 NEWBURY STREET LAWRENCE,MA 01841 | | PC | EDUCATIONAL SUPPORT | 1,000 |
| MOTHER CAROLINE ACA & ED CTR 515 BLUE HILL AVENUE DORCHESTER,MA 02121 | | PC | EDUCATIONAL SUPPORT | 4,000 |
| PARTNERS IN DEVELOPMENT INC PO BOX 9 IPSWICH, MA 01938 | | PC | EDUCATIONAL SUPPORT | 4,000 |
| SAVE THE HARBORSAVE THE BAY 212 NORTHERN AVENUE BOSTON,MA 02210 | | PC | EDUCATIONAL SUPPORT | 1,000 |
| THE BOSTON FOUNDATION ONE BOSTON PLACE BOSTON, MA 02108 | | PC | EDUCATIONAL SUPPORT | 1,000 |
| THE CAPE COD COUNCIL OF CHURCHES INC - A BABY CENTER PO BOX 758 HYANNIS,MA 02601 | | PC | EDUCATIONAL SUPPORT | 1,000 |
| Total | | | ▶ 3a | 47,000 |

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

| Recipient | If recipient is an individual, show any relationship to | Foundation status of | Purpose of grant or contribution | A mount |
|---|---|-------------------------|----------------------------------|---------|
| Name and address (home or business) | any foundation manager or substantial contributor | recipient | | |
| a Paid during the year | | | | |
| THE FOOD PROJECT PO BOX 705 LINCOLN, MA 01773 | | PC | AFTER SCHOOL PROGRAMS | 3,000 |
| THE HYDE SQUARE TASK FORCE 375 CENTRE STREET JAMAICA PLAIN, MA 02130 | | PC | EDUCATIONAL SUPPORT | 1,000 |
| THE JIMMY FUND 10 BROOKLINE PLACE WEST BROOKLINE,MA 02445 | | PC | CANCER RESEARCH | 5,000 |
| THE SECOND STEP PO BOX 600213 NEWTONVILLE, MA 02460 | | PC | EDUCATIONAL SUPPORT | 1,000 |
| THE WOODWARD SCHOOL 1102 HANCOCK STREET QUINCY,MA 02169 | | PC | EDUCATIONAL SUPPORT | 500 |
| WINDRUSH FARM BROOKVIEW ROAD BOXFORD,MA 01921 | | PC | EDUCATIONAL SUPPORT | 1,000 |
| WOLFEBORO AREA CHILDREN'S CENTER 180 SOUTH MAIN STREET WOLFEBORO,NH 03894 | | PC | EDUCATIONAL SUPPORT | 500 |
| YMCA - DORCHESTER BRANCH 776 WASHINGTON STREET DORCHESTER,MA 02124 | | PC | AFTER SCHOOL PROGRAMS | 5,000 |
| Total | | | | 47,000 |

TY 2014 Investments Corporate Stock Schedule

Name: MATTHEW J & GILDA F STRAZZULA FOUNDATION

EIN: 04-6910814

| Name of Stock | End of Year Book Value | End of Year Fair Market Value |
|-----------------------------|---------------------------|----------------------------------|
| 500 SHS BRISTOL MYERS | 12,286 | 29,515 |
| 300 SHS MCDONALDS | 19,104 | 28,110 |
| 400 SHS COCA COLA | 12,619 | 16,888 |
| 350 SHS CONOCOPHILLIPS | 19,270 | 24,171 |
| 300 SHS EXXON MOBIL | 25,089 | 27,735 |
| 350 SHS HOME DEPOT | 12,982 | 36,740 |
| 150 SHS IBM | 24,777 | 24,066 |
| 200 SHS NEXTERA ENERGY | 11,109 | 21,258 |
| 450 SHS QUALCOMM | 24,840 | 33,448 |
| 300 SHS UNITED TECHNOLOGIES | 24,738 | 34,500 |
| 1758 SHS PHILLIPS 66 | 6,076 | 12,548 |

TY 2014 Taxes Schedule

Name: MATTHEW J & GILDA F STRAZZULA FOUNDATION

EIN: 04-6910814

| Category | Amount | Net Investment Income | Adjusted Net Income | Disbursements for Charitable Purposes |
|-----------------------|--------|--------------------------|------------------------|---|
| FORM 990PF EXCISE TAX | 108 | 0 | | 0 |
| COMM OF MASS FORM PC | 35 | 0 | | 0 |