



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



Form

990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2014

Open to Public Inspection

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

Name of foundation THE LUCRETIA PHILANTHROPIC FOUNDATION INC		A Employer identification number 20-3964837	
Number and street (or P O box number if mail is not delivered to street address) 59 PARSONS STREET		B Telephone number (see instructions) (617) 928-3408	
City or town, state or province, country, and ZIP or foreign postal code NEWTON, MA 02465		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☒ Address change ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 29,377,029		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (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) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	4,800,115			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	417	417		
	4 Dividends and interest from securities.	529,017	529,017		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	566,825			
	b Gross sales price for all assets on line 6a 4,360,067				
	7 Capital gain net income (from Part IV, line 2) . . .		566,825		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	5,896,374	1,096,259		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	4,700	1,750		2,950
	c Other professional fees (attach schedule)	47,009	47,009		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	87,859	16,508		0
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	474	0		474
	24 Total operating and administrative expenses. Add lines 13 through 23	140,042	65,267		3,424
	25 Contributions, gifts, grants paid	1,508,600			1,508,600
	26 Total expenses and disbursements. Add lines 24 and 25	1,648,642	65,267		1,512,024
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	4,247,732			
	b Net investment income (if negative, enter -0-)		1,030,992		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	1,633,103	1,421,442	1,421,442
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	0	462,263	3,177,403
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	18,106,297	19,490,991	24,742,439
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)	20,432	35,745	35,745	
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	19,759,832	21,410,441	29,377,029	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	0	0	
	Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
24		Unrestricted			
25		Temporarily restricted			
26		Permanently restricted			
Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.					
27		Capital stock, trust principal, or current funds	19,759,832	21,410,441	
28		Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
29		Retained earnings, accumulated income, endowment, or other funds	0	0	
30		Total net assets or fund balances (see instructions)	19,759,832	21,410,441	
31		Total liabilities and net assets/fund balances (see instructions) . . .	19,759,832	21,410,441	

Part III Analysis of Changes in Net Assets or Fund Balances		
1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return)	1 19,759,832
2	Enter amount from Part I, line 27a	2 4,247,732
3	Other increases not included in line 2 (itemize) ▶	3 150,000
4	Add lines 1, 2, and 3	4 24,157,564
5	Decreases not included in line 2 (itemize) ▶	5 2,747,123
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6 21,410,441

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	SALES OF PUBLICLY-TRADED SECURITIES	P		
b	CAPITAL GAINS DIVIDENDS	P		
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 4,105,889		3,793,242	312,647
b 254,178			254,178
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			312,647
b			254,178
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	566,825
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	}	3	

Part V

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

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

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

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

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

1 Enter the appropriate amount in each column for each year, see instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2013	1,275,497	19,757,758	0 064557
2012	907,093	17,604,217	0 051527
2011	902,275	17,965,590	0 050222
2010	740,790	17,126,144	0 043255
2009	709,970	12,896,253	0 055052

2	Total of line 1, column (d).	2	0 264613
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 052923
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	25,177,953
5	Multiply line 4 by line 3.	5	1,332,493
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	10,310
7	Add lines 5 and 6.	7	1,342,803
8	Enter qualifying distributions from Part XII, line 4.	8	1,512,024

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See
the Part VI instructions

Part VI

Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a		Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	10,310
c		All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2		Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0
3		Add lines 1 and 2.		3	10,310
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0
5		Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	10,310
6		Credits/Payments			
a		2014 estimated tax payments and 2013 overpayment credited to 2014	6a	45,000	
b		Exempt foreign organizations—tax withheld at source	6b		
c		Tax paid with application for extension of time to file (Form 8868)	6c		
d		Backup withholding erroneously withheld	6d		
7		Total credits and payments. Add lines 6a through 6d.		7	45,000
8		Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.		8	51
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	34,639
11		Enter the amount of line 10 to be Credited to 2015 estimated tax ☒ 34,639 Refunded ☐		11	0

Part VII-A

Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		Yes	No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>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.</i>	1b			No
c	Did the foundation file Form 1120-POL for this year?	1c			No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ☒ \$ 0 (2) On foundation managers ☒ \$ 0				
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☒ \$ 0				
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2			No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes.</i>	3			No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a			No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b			
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5			No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6		Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7		Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions): ☒ DE				
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? <i>If "No," attach explanation.</i>	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)? <i>If "Yes," complete Part XIV.</i>	9			No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10			No

Part VII-A

Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address N/A				
14	The books are in care of THE FOUNDATION Telephone no (617) 928-3408 Located at 59 PARSONS STREET NEWTON MA ZIP +4 02465			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here and enter the amount of tax-exempt interest received or accrued during the year.	15		
16	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

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? Yes No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? Yes No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? Yes No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). Yes No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here.	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2014?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? If "Yes," list the years 20 , 20 , 20 , 20 Yes No			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Yes No			
b	If "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No		
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No		
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No		
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions).	☐ Yes ☒ No		
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No		
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?	5b		
	Organizations relying on a current notice regarding disaster assistance check here.	☒		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	☐ Yes ☐ No		
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No		
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		No
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No		
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				0

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		0

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3.	0

Part X

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	24,017,938
b	Average of monthly cash balances.	1b	1,507,691
c	Fair market value of all other assets (see instructions).	1c	35,745
d	Total (add lines 1a, b, and c).	1d	25,561,374
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	25,561,374
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	383,421
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	25,177,953
6	Minimum investment return. Enter 5% of line 5.	6	1,258,898

Part XI

Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	1,258,898
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	10,310
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	10,310
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	1,248,588
4	Recoveries of amounts treated as qualifying distributions.	4	150,000
5	Add lines 3 and 4.	5	1,398,588
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	1,398,588

Part XII

Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	1,512,024
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	1,512,024
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	10,310
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,501,714
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7				1,398,588
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2014				
a From 2009.	15,289			
b From 2010.				
c From 2011.	11,437			
d From 2012.	32,946			
e From 2013.	363,015			
f Total of lines 3a through e.	422,687			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 1,512,024				
a Applied to 2013, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2014 distributable amount.				1,398,588
e Remaining amount distributed out of corpus	113,436			
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	536,123			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions). . . .	15,289			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	520,834			
10 Analysis of line 9				
a Excess from 2010. . . .				
b Excess from 2011. . . .	11,437			
c Excess from 2012. . . .	32,946			
d Excess from 2013. . . .	363,015			
e Excess from 2014. . . .	113,436			

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

1a

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

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
		(a) 2014	(b) 2013	(c) 2012	(d) 2011	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed					
d	Amounts included in line 2c not used directly for active conduct of exempt activities					
e	Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . .					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part XVSupplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)

1

Information Regarding Foundation Managers:

a

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

SARAH LUTZ

b

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

2

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

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

a

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

b

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

c

Any submission deadlines

d

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

Form 990-PF (2014)

Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	1,508,600
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2014)

Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

(1) Cash.

(2) Other assets.

- (1)** Sales of assets to a noncharitable exempt organization.
- (2)** Purchases of assets from a noncharitable exempt organization.
- (3)** Rental of facilities, equipment, or other assets.
- (4)** Reimbursement arrangements.
- (5)** Loans or loan guarantees.
- (6)** Performance of services or membership or fundraising solicitations.

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

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

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

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

Sign Here	*****	2015-11-10	*****	May the IRS discuss this return with the preparer shown below (see instr)? ☒ Yes ☐ No
	Signature of officer or trustee	Date	Title	

Form **990-PF** (2014)

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SARAH LUTZ	PRESIDENT 1 00 211 WEST 11TH STREET NEW YORK,NY 10014	0	0	0
211 WEST 11TH STREET NEW YORK,NY 10014				
SARAH LUTZ	SECRETARY 1 00 211 WEST 11TH STREET NEW YORK,NY 10014	0	0	0
211 WEST 11TH STREET NEW YORK,NY 10014				
PAM SOLO	ASSISTANT SECRETARY 1 00 59 PARSONS STREET NEWTON,MA 02465	0	0	0
59 PARSONS STREET NEWTON,MA 02465				
SARAH LUTZ	TREASURER 1 00 211 WEST 11TH STREET NEW YORK,NY 10014	0	0	0
211 WEST 11TH STREET NEW YORK,NY 10014				
PAM SOLO	ASSISTANT TREASURER 1 00 59 PARSONS STREET NEWTON,MA 02465	0	0	0
59 PARSONS STREET NEWTON,MA 02465				

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 any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ADELANTE FOUNDATION PO BOX 4473 ENGLEWOOD,CO 80113	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	1,000
ASPCA NEWYORK CITY 520 8TH AVENUE 7TH FLOOR NEWYORK,NY 10018	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	1,000
BALLET HISPANICO OF NEWYORK INC 167 WEST 89TH STREET NEWYORK,NY 10024	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	13,500
CHILDREN'S ARTS GUILD 550J GRAND STREET 11F NEWYORK,NY 10002	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	60,000
COMMON GROUND COMMUNITIES INC (DBA COMMUNITY SOLUTIONS INC) 125 MAIDEN LANE STE 16C NEWYORK,NY 10038	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	420,000
DOCTORS WITHOUT BORDERS ATTN MS SARAH MCGOWEN 333 7TH AVE 2ND FLR NEWYORK,NY 10001	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	290,000
ENVIRONMENTAL WORKING GROUP 1436 U STREET NW100 WASHINGTON,DC 20009	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	100,000
EPIPHANY MAGAZINE INC 71 BEDFORD STREET NEWYORK,NY 10014	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	1,000
FINE ARTS WORK CENTER IN PROVINCETOWN INC 24 PEARL STREET PROVINCETOWN,MA 02657	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	1,000
FOOD BANK FOR NEWYORK CITY 39 BROADWAY 10TH FLOOR NEWYORK,NY 10006	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	54,000
FOUNDATION FOR NATIONAL PROGRESS (DBA MOTHER JONES MAGAZINE) 222 SUTTER STREET SUITE 600 SAN FRANCISCO,CA 94108	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	10,000
GO PROJECT 86 4TH AVENUE NEWYORK,NY 10003	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	20,000
GREENWICH HOUSE INC 224 WEST 30TH STREET NO 302 NEWYORK,NY 10001	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	2,000
HOUSING PLUS SOLUTIONS INC 4 WEST 43RD STREET SUITE 316 NEWYORK,NY 10036	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	3,000
INNER-CITY SCHOLARSHIP FUND 1011 FIRST AVENUE STE 1400 NEWYORK,NY 10022	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	28,100
Total  3a				1,508,600

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 any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
JUMA VENTURS INC 131 STEUART STREET SAN FRANCISCO,CA 94105	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	2,000
LITTLE RED SCHOOL HOUSE INC 40 CHARLTON STREET NEW YORK,NY 10014	N/A	PUBLIC CHARITY (A SC	GENERAL SUPPORT	50,000
LUNG CANCER RESEARCH FOUNDATION 845 THIRD AVENUE 6TH FLOOR NEW YORK,NY 10022	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	3,000
MASSACHUSETTS COLLEGE OF ART 621 HUNTINGTON AVENUE BOSTON,MA 02115	N/A	PUBLIC CHARITY (A SC	K - 12 OUTREACH PROGRAM	50,000
NEW YORK CITY BALLET INC 20 LINCOLN CENTER NEW YORK,NY 100236580	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	15,000
NEW YORK CITY COMMUNITY GARDEN COALITION INC 232 EAST 11TH STREET NEW YORK,NY 10003	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	1,000
OAK GROVE MONTESSORI SCHOOL INC 132 PLEASANT VALLEY ROAD MANSFIELD CENTER,CT 06250	N/A	PUBLIC CHARITY (A SC	GENERAL SUPPORT	2,000
PARTNERS IN HEALTH 888 COMMONWEALTH AVENUE BOSTON,MA 02215	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	50,000
PAYOMET PERFORMING ARTS CHARITABLE TRUST PO BOX 1202 TRURO,MA 02666	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	5,000
PROVINCETOWN AIDS SUPPORT GROUP INC (AKA AIDS SUPPORT GROUP OF CAPE COD) 96-98 BRADFORD ST PO BOX 1522 PROVINCETOWN,MA 02657	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	3,000
PROVINCETOWN ART ASSOCIATION AND MUSEUM INC 460 COMMERCIAL STREET PROVINCETOWN,MA 02657	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	3,000
RUTGERS UNIVERSITY FOUNDATION - INSTITUTE OF JAZZ STUDIES 7 COLLEGE AVENUE WINANTS HALL NEW BRUNSWICK,NJ 08901	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	50,000
THE INNOCENCE PROJECT INC 40 WORTH STREET SUITE 7010 NEW YORK,NY 10013	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	1,000
THE NEW YORK WOMEN'S FOUNDATION 434 WEST 33RD STREET 8TH FLOOR NEW YORK,NY 10001	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	50,000
THE SISTERS OF LORETTO 4000 S WADSWORTH LITTLETON,CO 80123	N/A	PUBLIC CHARITY	SUPPORT THE GHANA PROGRAM	10,000
Total  3a				1,508,600

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 any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
THE STUDIO IN A SCHOOL ASSOCIATION INC 410 WEST 59TH STREET NEWYORK,NY 10019	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	30,000
TRURO CENTER FOR THE ARTS AT CASTLE HILL PO BOX 756 TRURO,MA 02666	N/A	PUBLIC CHARITY (A SC	GENERAL SUPPORT	21,000
TRUST FOR CONSERVATION INNOVATION 150 POST STREET 342 SAN FRANCISCO,CA 94108	N/A	PUBLIC CHARITY (509(	SANE ENERGY PROJECT	120,000
VERMONT STUDIO SCHOOL INC (AKA VERMONT STUDIO CENTER) 80 PEARL STREET JOHNSON,VT 05656	N/A	PUBLIC CHARITY (A SC	GENERAL SUPPORT	30,000
WCAI (THE CAPE AND ISLANDS NPR STATION) 3 WATER STREET PO BOX 82 WOODS HOLE,MA 02543	N/A	PUBLIC CHARITY	GENERAL SUPPORT	1,000
WELLFLEET CONSERVATION TRUST PO BOX 84 WELLFLEET,MA 02667	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	2,000
WELLFLEET HARBOR ACTORS THEATRE INC PO BOX 797 WELLFLEET,MA 02667	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	2,000
WELLFLEET PRESERVATION HALL PO BOX 3024 WELLFLEET,MA 02667	N/A	PUBLIC CHARITY (509(	GENERAL SUPPORT	1,000
WKCR - COLUMBIA UNIVERSITY 515 LERNER HALL MC2601 2929 BROADWAY NEWYORK,NY 10027	N/A	PUBLIC CHARITY (A SC	GENERAL SUPPORT	1,000
WOMR PO BOX 975 PROVINCETOWN,MA 02657	N/A	PUBLIC CHARITY	GENERAL SUPPORT	1,000
Total  3a				1,508,600

TY 2014 Accounting Fees Schedule

Name: THE LUCRETIA PHILANTHROPIC FOUNDATION INC

EIN: 20-3964837

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
KENNETH FREED & COMPANY	4,550	1,750		2,800
STANTON & COMPANY	150	0		150

**TY 2014 Investments Corporate
Stock Schedule****Name:** THE LUCRETIA PHILANTHROPIC FOUNDATION INC**EIN:** 20-3964837

Name of Stock	End of Year Book Value	End of Year Fair Market Value
BOEING CO - 4218 SHS	4,198	548,255
CHEVRON CORP - 4409 SHS	95,776	494,602
CONOCOPHILLIPS - 7083 SHS	89,393	489,152
EOG RESOURCES INC - 1600 SHS	100,031	147,312
GENERAL ELECTRIC CO - 19379 SHS	30,991	489,707
NIKE INC - 5205 SHS	101,177	500,461
TARGET CORP - 6691 SHS	40,697	507,914

TY 2014 Investments - Other Schedule

Name: THE LUCRETIA PHILANTHROPIC FOUNDATION INC
 EIN: 20-3964837

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ISHARES RUSSELL 2000 INDEX - 3600 SHS	AT COST	275,938	430,633
JPM INTREPID AMERICA FUND - 39250.620 SHS	AT COST	800,111	1,494,271
MATTHEWS PACIFIC TIGER FUND - 36853.143 SHS	AT COST	768,594	978,819
JPM SHORT DURATION BOND FUND - 82751.13 SHS	AT COST	891,287	898,677
DODGE & COX INT'L STOCK - 17332.250 SHS	AT COST	736,279	729,861
ISHARES RUSSEL MIDCAP INDEX FUND - 12100 SHS	AT COST	709,363	2,021,184
JPM US LARGE CAP CORE PLUS FUND - 41985.520 SHS	AT COST	820,132	1,234,374
ISHARES MSCI EAFE INDEX FUND - 48751 SHS	AT COST	3,066,095	2,966,011
BLACKSTONE PARTNERS OFFSHORE FUND LTD CLASS H2 NEW ISSUES - 861.400 SHS	AT COST	900,000	1,200,576
HMLP MULTI-STRATEGY PRIVATE INVESTORS LTD CLASS D - 95.696 SHS	AT COST	125,001	160,448
CULLEN HIGH DIVIDEND EQUITY FUND - 29857.905 SHS	AT COST	352,920	519,527
SPDR S&P 500 ETF TRUST - 16622.000 SHS	AT COST	1,750,875	3,416,486
JPM INT'L VALUE FUND INSTL - 40812.290 SHS	AT COST	520,000	541,171
HMLP MULTI-STRATEGY PRIVATE INVESTORS LTD CLASS E - 57.207 SHS	AT COST	62,500	75,496
OCH-ZIFF OXOFII PRIVATE INVESTORS TRANCHE G - 7921.816 SHS	AT COST	1,150,000	1,354,063
EATON VANCE GLOBAL MACRO - 65575.451 SHS	AT COST	637,873	610,507
NEUBERGER BERMAN MU/C OPP - 60048.431 SHS	AT COST	679,904	942,760
CULLEN INT'L HIGH DIVIDEN FUND - 27233.115 SHS	AT COST	250,000	275,054
MFS INTL VALUE - 11467.890 SHS	AT COST	300,000	396,101
PIMCO COMMODITIES PLUS STRATEGY - 79884.219 SHS	AT COST	861,164	611,114
VIRTUS EMERGING MKTS OPPOR - 26398.775 SHS	AT COST	260,028	261,084
DOUBLE LINE TOTAL RET - 54455.57 SHS	AT COST	593,026	597,378
GATEWAY FUND Y - 30199.761 SHS	AT COST	873,871	893,007
BROWN ADV JAPEN ALPHA OPP - 20782.808 SHS	AT COST	204,295	224,039
JPM GLOBAL RES ENH INDEX FUND - 55144.051 SHS	AT COST	990,939	1,009,688
GOLDMAN SACHS TRUST - 87407.550 SHS	AT COST	910,000	898,550
HB MULTI-STRATEGY HOLDINGS LTD CLASS B SERIES 45 - .003 SHS	AT COST	270	520
HB MULTI-STRATEGY HOLDINGS LTD CLASS B SERIES 49 - .003 SHS	AT COST	246	520
HB MULTI-STRATEGY HOLDINGS LTD CLASS B SERIES 47 - .003 SHS	AT COST	280	520

TY 2014 Other Assets Schedule

Name: THE LUCRETIA PHILANTHROPIC FOUNDATION INC

EIN: 20-3964837

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
DIVIDEND ACCRUALS	20,432	35,745	35,745

TY 2014 Other Decreases Schedule**Name:** THE LUCRETIA PHILANTHROPIC FOUNDATION INC**EIN:** 20-3964837

Description	Amount
DIFFERENCE BETWEEN FMV AT GIFT DATE AND TAX COST FOR DONATED SECURITIES	2,737,852
UNREALIZED LOSS DUE TO COST BASIS ADJUSTMENT	9,271

TY 2014 Other Expenses Schedule

Name: THE LUCRETIA PHILANTHROPIC FOUNDATION INC

EIN: 20-3964837

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FILING FEES	225	0		225
OFFICE SUPPLIES	249	0		249

TY 2014 Other Increases Schedule**Name:** THE LUCRETIA PHILANTHROPIC FOUNDATION INC**EIN:** 20-3964837

Description	Amount
RETURN OF PRIOR YEAR GRANT PAID	150,000

TY 2014 Other Professional Fees Schedule

Name: THE LUCRETIA PHILANTHROPIC FOUNDATION INC

EIN: 20-3964837

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
JP MORGAN - MANAGEMENT FEES	47,009	47,009		0

TY 2014 Taxes Schedule**Name:** THE LUCRETIA PHILANTHROPIC FOUNDATION INC**EIN:** 20-3964837

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	16,508	16,508		0
FEDERAL INCOME TAX	71,351	0		0

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.	OMB No 1545-0047 2014
---	--	---

Name of the organization THE LUCRETIA PHILANTHROPIC FOUNDATION INC	Employer identification number 20-3964837
--	---

Organization type (check one)

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

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

General Rule

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

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc , purposes, but no such contributions totaled more than \$1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions totaling \$5,000 or more during the year ▶ \$ _____

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

Name of organization THE LUCRETIA PHILANTHROPIC FOUNDATION INC	Employer identification number 20-3964837
--	---

Part I	Contributors (see instructions) Use duplicate copies of Part I if additional space is needed		
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
 ____	See Additional Data Table _____ _____ _____	 \$ _____	 Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
 ____	 _____ _____ _____	 \$ _____	 Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
 ____	 _____ _____ _____	 \$ _____	 Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
 ____	 _____ _____ _____	 \$ _____	 Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
 ____	 _____ _____ _____	 \$ _____	 Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
 ____	 _____ _____ _____	 \$ _____	 Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
 ____	 _____ _____ _____	 \$ _____	 Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)

Name of organization THE LUCRETIA PHILANTHROPIC FOUNDATION INC	Employer identification number 20-3964837
--	---

Part II	Noncash Property (see Instructions) Use duplicate copies of Part II if additional space is needed		
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	See Additional Data Table	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____		\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____		\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____		\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____		\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____		\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____		\$ _____	_____

Name of organization THE LUCRETIA PHILANTHROPIC FOUNDATION INC	Employer identification number 20-3964837
---	--

Part III

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

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	

Additional Data

Software ID:

Software Version:

EIN: 20-3964837

Name: THE LUCRETIA PHILANTHROPIC FOUNDATION INC

Form 990 Schedule B, Part I - Contributors (see Instructions) Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
<u>1</u>	SARAH LUTZ 211 WEST 11TH STREET NEW YORK, NY 10014	\$ 1,600,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
<u>2</u>	SARAH LUTZ 211 WEST 11TH STREET NEW YORK, NY 10014	\$ 546,863	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contribution)
<u>3</u>	SARAH LUTZ 211 WEST 11TH STREET NEW YORK, NY 10014	\$ 499,978	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contribution)
<u>4</u>	SARAH LUTZ 211 WEST 11TH STREET NEW YORK, NY 10014	\$ 499,937	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contribution)
<u>5</u>	SARAH LUTZ 211 WEST 11TH STREET NEW YORK, NY 10014	\$ 499,952	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contribution)
<u>6</u>	SARAH LUTZ 211 WEST 11TH STREET NEW YORK, NY 10014	\$ 499,989	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7	SARAH LUTZ 211 WEST 11TH STREET NEW YORK, NY 10014	\$ 499,940	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contribution)
8	SARAH LUTZ 211 WEST 11TH STREET NEW YORK, NY 10014	\$ 153,456	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contribution)

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
<u>2</u>	4217 996 SHS OF BOEING CO	\$ <u>546,863</u>	<u>2014-12-23</u>
<u>3</u>	19379 SHS OF GENERAL ELECTRIC CO	\$ <u>499,978</u>	<u>2014-12-23</u>
<u>4</u>	4409 SHS OF CHEVRON CORP	\$ <u>499,937</u>	<u>2014-12-23</u>
<u>5</u>	6691 SHS OF TARGET CORP	\$ <u>499,952</u>	<u>2014-12-23</u>
<u>6</u>	7083 SHS OF CONOCOPHILLIPS	\$ <u>499,989</u>	<u>2014-12-23</u>
<u>7</u>	5205 SHS OF NIKE INC	\$ <u>499,940</u>	<u>2014-12-23</u>
<u>8</u>	1600 SHS OF EOG RESOURCES INC	\$ <u>153,456</u>	<u>2014-12-23</u>