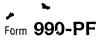


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OMB No 1545-0052

Department of the Treasury Internal Revenue Service

Return of Private Foundation
or Section 4947 (a) (1) Trinst Treated as Private Foundation
| Do not enter so calsecurity numbers on this form as it may be made public.
| Information about Form 990-PF and its separate instructions is at www.lrs.gov/form990pf.

| For | caler | dar year 2014 or tax year beginning | | , and ending | | |
|---------------------------------------|-------------|--|---|---------------------------------------|--|---|
| Na | ne of | foundation | | | A Employer identification | number |
| W | IN | TMAN FAMILY CHARITABLE | TRUST B | | | |
| | | BRUCE I WINTMAN | <u>, , , , , , , , , , , , , , , , , , , </u> | · · · · · · · · · · · · · · · · · · · | 27-6664980 | |
| | | and street (or P O box number if mail is not delivered to street | address) | Room/suite | B Telephone number | ^ |
| | | ASHFORD ROAD | | | 413-933-22 | |
| | | own, state or province, country, and ZIP or foreign p GMEADOW,MA 01106 | ostal code | | C If exemption application is p | ending, check here |
| | | all that apply: Initial return | Initial return of a fo | rmer public charity | D 1. Foreign organizations | s. check here |
| • | ,,,,,,,,,, | Final return | Amended return | The passe shartly | | |
| | | Address change | Name change | | Foreign organizations me check here and attach co | eting the 85% test, mputation |
| H (| Check | type of organization: X Section 501(c)(3) ex | cempt private foundation | | E If private foundation sta | |
| | Se | r | Other taxable private founda | tion | under section 507(b)(1) | |
| I Fa | air ma | arket value of all assets at end of year J Accounti | ng method: X Cash | Accrual | F If the foundation is in a | 60-month termination |
| (fi | om I | Part II, col. (c), line 16) | her (specify) | | under section 507(b)(1) | |
| | \$ | 2,050,971. (Part I, colu | mn (d) must be on cash b | pasis.) | | |
| Pa | art I | Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) |
| | 1 | Contributions, gifts, grants, etc., received | | | | |
| | 2 | Check X if the foundation is not required to attach Sch. B | | | | |
| | 3 | Interest on savings and temporary cash investments | | · | | |
| | 4 | Dividends and interest from securities | 46,234. | 46,234 | • | STATEMENT 1 |
| | 5a | Gross rents | | | | |
| | b | Net rental income or (loss) | 4 5 4 6 5 | | | |
| ē | 6a | Net gain or (loss) from sale of assets not on line 10 Gross sales price for all | 17,137. | | | |
| Revenue | b | assets on line 6a 98,024. | | 17 127 | | |
| Ŗ. | 7 | Capital gain net income (from Part IV, line 2) | | 17,137 | • 7 | |
| | 8 | Net short-term capital gain Income modifications | | | 1 1 tom 27 | 2.35 |
| | 10a | Grace calce loss returns | | | | |
| | Ι. | Less Cost of goods sold | | | 1 | |
| | l | Gross profit or (loss) | | | | |
| | 11 | Other income | | | | |
| | 12 | Total. Add lines 1 through 11 | 63,371. | 63,371 | 0. | |
| | 13 | Compensation of officers, directors, trustees, etc | 0. | 0 | . 0. | 0. |
| | 14 | Other employee salaries and wages | | | <u> </u> | |
| w | 15 | Pension plans, employee benefits | | | | |
| Se | 16a | Legal fees | | | | |
| ber | b | Accounting fees STMT 2 | 5,928. | 0 | . 0. | 5,928. |
| Ω̈́ | C | Other professional fees | | | | |
| ţį | 17 | Interest | 0.67 | 221 | - | |
| Operating and Administrative Expenses | 18 | Taxes STMT 3 | 967. | 331 | 0. | 0. |
| iii | 19 20 | Depreciation and depletion Occupancy | | | | |
| ₽ | 21 | Travel, conferences, and meetings | | | ļ | <u> </u> |
| ď | 22 | Printing and publications | | | | |
| g | 23 | Other expenses | | | | |
| atin | 24 | Total operating and administrative | | | | |
| Ser. | | expenses. Add lines 13 through 23 | 6,895. | 331 | . 0. | 5,928. |
| Õ | 25 | Contributions, gifts, grants paid | 84,745. | | | 84,745. |
| | | Total expenses and disbursements. | | | | |
| | | Add lines 24 and 25 | 91,640. | 331 | . 0. | 90,673. |
| | 27 | Subtract line 26 from line 12: | | | | |
| | a | Excess of revenue over expenses and disbursements | <28,269. | <u> </u> | | |
| | b | Net investment income (if negative, enter -0-) | | 63,040 | | |
| 4000 | | Adjusted net income (if negative, enter -0-) | | | 0. | |
| 4235 11-2 | ∪ 1 4-14 | LHA For Paperwork Reduction Act Notice, see | instructions. | | a14 17 | Form 990-PF (2014) |

| Cases - non-centrest-bearing Cases - non-centrest-bearing Seyrings and tringorary scale investments A Pleague recentable ► Less allowance for doubtild accounts ► A Pleague recentable ► Less allowance for doubtild accounts ► Cannot receivable Less allowance for doubtild accounts ► B investments of basin or size of the size of the size allowance for doubtild accounts ► B investments of solar or use B investments - comporate boads B investments - comporate boads B investments - comporate boads 11 investments - comporate boads 12 investments - comporate boads 13 investments - comporate boads 14 investments - comporate boads 15 Other assets (describe ► 15 Other assets (festoribe ► 16 Total savate stercous 17 investments - comporate boads 18 investments - comporate boads 19 Investments - comporate boads 10 investments - comporate boads 11 investments - comporate boads 11 investments - comporate boads 11 investments - comporate boads 12 investments - comporate boads 13 investments - comporate boads 14 investments - comporate boads 15 Other assets (festoribe ► 16 Total savate derecase 17 Total material of the completed by all filters - see the institutions A Mong are pages 1, feen I) 17 Accounting spayable and accorded expenses 18 Garns payable and accorded expenses 19 Deleter of exemine 22 Total liabilities (describe FAS 117, check here | <u>F0</u> | | 90-PF (2014) C/O BRUCE I WINIMAN | Beginning of year | | 600496U Page 2 |
|--|-----------|--------|--|--|------------------|---|
| Cash - note interest-bearing 2 Seming and impressary cells investments 3 Accounts receivable Less allowance for doubtful accounts 4 Philogopy receivable Less, allowance for doubtful accounts 4 Philogopy receivable Less, allowance for doubtful accounts 4 Philogopy receivable Cash and accounts 4 Philogopy receivable 4 Philogopy receivabl | F | art | Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only | | | |
| 2 Symps and temporary cash investments 3 Accounts receivable ▶ Less allowance for doubtful accounts ▶ 4 Precipes receivable ▶ Less allowance for doubtful accounts ▶ 5 Soans receivable 8 Receivable sout from cilicers, directors, brustees, and other doubtful accounts ▶ 1 Soans receivable 8 Receivable sout from cilicers, directors, brustees, and other doubtful accounts ▶ 1 Soans receivable ↑ 1 Investments of sall or use 1 Investments - Comporate stock 2 Investments - Comporate stock 3 Investments - Comporate stock 4 Investments - Comporate stock 5 Investments - Comporate stock 6 Investments - Comporate stock 7 Investments - Comporate stock 8 Investments - Comporate stock 9 Investments - Comporate stock 1 Investments - Comporate stock 1 Investments - Comporate stock 1 Investments - Comporate stock 2 Investments - Comporate stock 2 Investments - Comporate stock 2 Investments - Comporate stock 3 Investments - Comporate stock 1 Investments - Comporate stock 1 Investments - Comporate stock 2 Investments - Comporat | | Ìī | Cash - non-interest-hearing | | (6) 2001. 14.40 | (0) 1 2 1 1 2 1 2 1 2 1 2 1 2 1 2 1 2 1 2 |
| Security receivable | | 1 | _ | | | |
| Less: allowance for doubtful accounts Perpeture reconstable Less: allowance for doubtful accounts Less: allowance for doubtful | | 1 | | ······································ | | |
| Principal recursible Lises allowance for doubtful accounts | | ٦ | | | į | |
| S Graits reservable 6 Receivables due from officers, directors, vusites, and other degualities persons 7 Deline abuse flores and deferred charges 18 Investments - U.S. and state government obligations 18 Investments - U.S. and state government obligations 18 Investments - U.S. and state government obligations 18 Investments - Comporate bonds 19 Investments - Comporate bonds 10 Investments - Comporate bonds 11 Investments - Comporate bonds 12 Investments - Comporate bonds 13 Investments - montpage loans 13 Investments - montpage loans 13 Investments - montpage loans 14 Land, buildings, and equipment basis ► Lis accombinate describation 15 Other assets (Secribe ► 15 Total assets (Does completed by still Mers - see the instructions. Also, see page 1, term 1) 17 Accounts payable and accrued septenses 18 Grains payable 19 Deferred foreviewe 21 Mortgages and other notes payable 22 Investments lines 24 through 25 and lines 30 and 31. 23 Land Institutions flat follow SFAS 117, check here and complete lines 27 through 22 for and complete lines 27 through 31 Capital stock, mist from the SFAS 117, check here and complete lines 27 through 32 Total liabilities (and tenors, nucleas, and other notes payable 23 Pad-in or capital surplus, or land, bidg., and equipment funds 24 Pad-in or capital surplus, or land, bidg., and equipment funds 25 Temporarily restricted 26 Permanently restricted 27 Permanently restricted 28 Permanently restricted 39 Permanently restricted 30 Capital stock, mist grouppe, or current funds 30 Capital stock, mist grouppe, or current funds 40 Capital stock, mist grouppe, or current funds 50 Capital stock, mist grouppe, or current funds 50 Capital stock, mist grouppe, or current funds 50 Capital stock, mist grouppe, or current funds 51 Capital stock, mist grouppe for permit grouppe | | | | | | |
| S Grants received be Received best during the first of the search transfers o | | 1 | | | | |
| Comparison of the compariso | | ١, | | | | |
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| The sease and elementary and celementary sets of the delances and celementary sets o | | ٥ | · | | | |
| Sees allowance for doubtul accounts | |] _ | | | | |
| Total liabilities (add lines 17 through 22) Total liabilities and net assets or fund balances Total liabilities and net assets for fund balances Total liabilities a | | ' | | | | |
| Prepare expenses and deferred charges 10a investments - U.S. and state government obligations b Investments - corporate bonds 11 investments - corporate bonds 12 investments - ordinaries and expenses as expenses 13 investments - ordinaries and expenses 14 Land, buildings, and equipment basis | | | | | | |
| Investments - corporate stock STMT 4 9,804 10,303 30,178 | ets |] | | | | |
| Investments - corporate stock STMT 4 9,804 10,303 30,178 | Ass | | · · · | | | |
| Comparison to compare bonds 11 Investments - control gape loans 12 Investments - mortgage loans 13 Investments - other STMT 5 1,572,873 1,542,068 2,020,793 14 Land, buildings, and equipment: basis 15 Other assets (discorbe 15 Other assets (discorbe 16 Total assets (to be completed by all filters - see the instructions. Also, see page 1, tem 1) 1,582,678 1,552,371 2,050,971 17 Accounts payable and acrued expenses 18 Grants payable and acrued expenses 19 Deferred revenue 19 Deferred revenue 19 Deferred revenue 10 Deferred revenue 1 | _ | , | _ | | 10 202 | 20 170 |
| Investments - under buddings, and equipment basis | | | · | 9,804. | 10,303. | 30,178. |
| List accumulated exprecations 12 Investments - other | | 1 | · | | | |
| 12 Investments - mortgage loans 1,572,873. 1,542,068. 2,020,793. | | 11 | Investments - land, buildings, and equipment basis | | | |
| 13 Investments - other STMT 5 | | | · · · · · · · · · · · · · · · · · · · | | | |
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| 15 Other assets (describe 16 Total assets (to be completed by all filers - see the instructions, Also, see page 1, item I) | | 14 | Land, buildings, and equipment: basis | | | |
| 16 Total assets (to be completed by all filters - see the instructions, Also, see page 1, item!) | | | Less accumulated depreciation | | | |
| Instructions. Also, see page 1, riem 1, 582, 678 | | 15 | Other assets (describe ►) | | | |
| Accounts payable and accrued expenses | | 16 | Total assets (to be completed by all filers - see the | } | İ | |
| 18 Grants payable Deferred revenue Deferred revenue 20 Leans from officers, directors, irustees, and other disqualified persons 21 Mortgages and other notes payable 20 Other liabilities (add lines 17 through 22) 0 . 0 . 0 . | | | instructions. Also, see page 1, item I) | 1,582,678. | 1,552,371. | 2,050,971. |
| 19 Deferred revenue 10 Leans from officers, directors, trustees, and other disqualified persons 21 Mortgages and other notes payable 22 Other liabilities (describe ►) 23 Total liabilities (add lines 17 through 22) 40 Total liabilities (add lines 17 through 26 and lines 30 and 31. 41 Unrestricted 42 Unrestricted 43 Temporarily restricted 44 Foundations that do not follow SFAS 117, check here ► XI and complete lines 27 through 31 42 Unrestricted 45 Permanently restricted 46 Foundations that do not follow SFAS 117, check here ► XI and complete lines 27 through 31 47 Capital stock, trust principal, or current funds 48 Paid-in or capital surplus, or land, bldg., and equipment fund 49 Paid-in or capital surplus, or land, bldg., and equipment funds 40 0. 0. 41 Total net assets or fund balances 41 Total liabilities and net assets/fund balances 41 Total liabilities and net assets/fund balances 41 Total liabilities and net assets/fund balances 41 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 42 (must agree with end-of-year figure reported on prior year's return) 43 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 44 Add lines 1, 2, and 3 45 Qualities 1, 2, and 3 46 Add lines 1, 2, and 3 47 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 48 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 49 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 50 Leass return (b), line 30 50 Leass return (b), line 30 60 1, 552, 371. | | 17 | Accounts payable and accrued expenses | | | |
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| 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 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other lunds 30 Total net assets or fund balances 31 Total liabilities and net assets/fund balances 4 Total net assets or fund balances at beginning of year - Part II, collumn (a), line 30 (must agree with end-of-year figure reported on prior year's return) 20 Total net assets or fundbalances 21 Total net assets or fund balances at beginning of year - Part II, collumn (a), line 30 (must agree with end-of-year figure reported on prior year's return) 30 Other increases not included in line 2 (itemize) 30 Other increases not included in line 2 (itemize) 31 Decreases not included in line 2 (itemize) 32 Decreases not included in line 2 (itemize) 33 Decreases not included in line 2 (itemize) 34 Add lines 1, 2, and 3 55 Decreases not included an line 2 (itemize) 36 Decreases not included an line 2 (itemize) 37 Dotal net assets or fund balances at end of year (line 4 minus line 5) - Part III, column (b), line 30 46 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 56 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 57 Decreases not fund balances at end of year (line 4 minus line 5) - Part III, column (b), line 30 58 Decreases not fund balances at end of year (line 4 minus line 5) - Part III, column (b), line 30 58 Decreases not fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 59 Decreases not fund balances at end of year (line 4 minus line 5) - Part III, column (b), line 30 50 Decreases not fund balances at end of year (line 4 minus line 5) - Part III, column (b), line 30 50 Decreases not fund balances at end of year (l | _ | 22 | Other liabilities (describe >) | | | |
| 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 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other lunds 30 Total net assets or fund balances 31 Total liabilities and net assets/fund balances 4 Total net assets or fund balances at beginning of year - Part II, collumn (a), line 30 (must agree with end-of-year figure reported on prior year's return) 20 Total net assets or fundbalances 21 Total net assets or fund balances at beginning of year - Part II, collumn (a), line 30 (must agree with end-of-year figure reported on prior year's return) 30 Other increases not included in line 2 (itemize) 30 Other increases not included in line 2 (itemize) 31 Decreases not included in line 2 (itemize) 32 Decreases not included in line 2 (itemize) 33 Decreases not included in line 2 (itemize) 34 Add lines 1, 2, and 3 55 Decreases not included an line 2 (itemize) 36 Decreases not included an line 2 (itemize) 37 Dotal net assets or fund balances at end of year (line 4 minus line 5) - Part III, column (b), line 30 46 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 56 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 57 Decreases not fund balances at end of year (line 4 minus line 5) - Part III, column (b), line 30 58 Decreases not fund balances at end of year (line 4 minus line 5) - Part III, column (b), line 30 58 Decreases not fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 59 Decreases not fund balances at end of year (line 4 minus line 5) - Part III, column (b), line 30 50 Decreases not fund balances at end of year (line 4 minus line 5) - Part III, column (b), line 30 50 Decreases not fund balances at end of year (l | | | | | | |
| and complete lines 24 through 26 and lines 30 and 31. Unrestricted 25 Temporarily restricted 26 Permanently restricted 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bidg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 31 Total liabilities and net assets/fund balances 4 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) 20 Enter amount from Part I, line 27a 31 Other increases not included in line 2 (itemize) Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ADJUSTMENT 5 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 7 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 7 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 8 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 8 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 8 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 9 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 9 Total net assets or fund balances at end of year (line 4 minus line 5) - P | | 23 | Total liabilities (add lines 17 through 22) | 0. | 0. | |
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| 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 31 Total liabilities and net assets/fund balances 4 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) 20 Enter amount from Part I, line 27a 31 Other increases not included in line 2 (itemize) Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ADJUSTMENT 5 Capital stock, trust principal, or current funds 0 . 0 . 0 . 0 . 0 . 0 . 0 . 0 . 0 . 0 . | | | and complete lines 24 through 26 and lines 30 and 31. | | | |
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| 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 31 Total liabilities and net assets/fund balances 4 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) 20 Enter amount from Part I, line 27a 31 Other increases not included in line 2 (itemize) Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ADJUSTMENT 5 Capital stock, trust principal, or current funds 0 . 0 . 0 . 0 . 0 . 0 . 0 . 0 . 0 . 0 . | lan | 25 | Temporarily restricted | | | |
| 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 31 Total liabilities and net assets/fund balances 4 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) 20 Enter amount from Part I, line 27a 31 Other increases not included in line 2 (itemize) Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ADJUSTMENT 5 Capital stock, trust principal, or current funds 0 . 0 . 0 . 0 . 0 . 0 . 0 . 0 . 0 . 0 . | Ва | 26 | Permanently restricted | | | |
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| 28 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 31 Total liabilities and net assets/fund balances 1,582,678. 1,552,371. 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) 20 Enter amount from Part I, line 27a 30 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 ADJUSTMENT 5 2,038. 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 1,552,371. | ō | 27 | | 0. | 0. | |
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| 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ ADJUSTMENT 5 2,038. 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 1 1,582,678. 2 <28,269.> 3 0. 4 1,554,409. 5 2,038. | ~ | | | | | |
| 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ ADJUSTMENT 5 2,038. 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 1 1,582,678. 2 <28,269.> 3 0. 4 1,554,409. 5 2,038. | | 31 | Total liabilities and net assets/fund balances | 1,582,678 | 1,552,371. | |
| 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ► 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ► ADJUSTMENT 5 2,038. 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 1 1,582,678. 2 <28,269.> 3 0.• 4 1,554,409. 5 2,038. | P | | | | | |
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| 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ ADJUSTMENT 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 2 <28, 269.> 3 0. 4 1,554,409. 5 2,038. | | | | NU . | | 1 500 600 |
| 3 0. 4 Add lines 1, 2, and 3 4 1,554,409. 5 Decreases not included in line 2 (itemize) ▶ ADJUSTMENT 5 2,038. 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 1,552,371. | | • | | | 1 | |
| 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ADJUSTMENT 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 4 1,554,409. 5 2,038. 6 1,552,371. | | | | | | |
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| | | | | | | |
| | 6 | ı otal | net assets or fund balances at end of year (line 4 minus line 5) - Part II, col | umn (b), line 30 | | 1,552,371. Form 990-PF (2014) |

C/O BRUCE I WINTMAN

27-6664980 Part IV Capital Gains and Losses for Tax on Investment Income (b) How acquired P - Purchase D - Donation (c) Date acquired (a) List and describe the kind(s) of property sold (e.g., real estate, (d) Date sold (mo., day, yr.) (mo., day, yr.) 2-story brick warehouse; or common stock, 200 shs. MLC Co.) 11/17/14 SHS SMALL-CAP INDEX FUND ADM 11/19/10 P P b 2622.378 SHS INTER-TERM BOND INDEX ADM 10/19/10 10/02/14 c 2613.240 SHS INTER-TERM BOND INDEX ADM P 10/19/10 11/17/14 d CAPITAL GAINS DIVIDENDS (h) Gain or (loss) (f) Depreciation allowed (g) Cost or other basis (e) Gross sales price (e) plus (f) minus (g) (or allowable) plus expense of sale 35,000 19,870. 15,130. а 30,000. 30,862 <862.> 30,755 30,000. <755.> 3,624. 3,624. đ (I) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (j) Adjusted basis (k) Excess of col. (i) (i) F.M.V. as of 12/31/69 Losses (from col. (h)) over col. (j), if any as of 12/31/69 15,130. <862.> b <755.> 3,624. е If gain, also enter in Part I, line 7 17,137. 2 Capital gain net income or (net capital loss) If (loss), enter -0- in Part I, line 7 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). N/AIf (loss), enter -0- in Part I, line 8 Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income Part V (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. 🗌 Yes 🗶 No Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part, Enter the appropriate amount in each column for each year; see the instructions before making any entries. (d) Distribution ratio (b) (c) Base period years Calendar year (or tax year beginning in) Adjusted qualifying distributions Net value of noncharitable-use assets (col. (b) divided by col (c)) 88,083. 1,876,085 2013 .046950 2012 91,751. 1,735,744. .052860 36,477. 1,654,050 .022053 2011 24,191. 2010 1,459,353 .016577 2009 2 Total of line 1, column (d) .138440 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 .034610 3 4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5 <u>2,014,819.</u> Multiply line 4 by line 3 5 69,733**.** Enter 1% of net investment income (1% of Part I, line 27b) 6 630. 7 Add lines 5 and 6 70,363. 90,673. Enter qualifying distributions from Part XII, line 4 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.

| | m 990-PF (2014) C/O BRUCE I WINTMAN 27-6 art VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - s | 66498 see inst | | Page 4 |
|----|---|-------------------|----|-----------------|
| 1 | a Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. | | | |
| | Date of ruling or determination letter: | | | |
| | b Domestic foundations that meet the section 4940(e) requirements in Part V, check here 🕨 🗶 and enter 1% | | | <u>630.</u> |
| | of Part I, line 27b | | | |
| | 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-) | | | 0. |
| 3 | | | | <u>630.</u> |
| 4 | Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) | | | 0. |
| 5 | Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0- | | | <u>630.</u> |
| 6 | | | | |
| | a 2014 estimated tax payments and 2013 overpayment credited to 2014 6a 680. | | | |
| | b Exempt foreign organizations - tax withheld at source 6b | | | |
| | c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld 6d | | | |
| | d Backup withholding erroneously withheld Total credits and payments. Add lines 6a through 6d 7 | | | 680. |
| Ω | Enter any penalty for underpayment of estimated tax. Check here X if Form 2220 is attached | | | 500. |
| a | Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed | | | |
| 10 | | | | 50. |
| | Enter the amount of line 10 to be: Credited to 2015 estimated tax | | | 0. |
| | art VII-A Statements Regarding Activities | | | |
| 18 | a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in | | Ye | s No |
| | any political campaign? | 18 | | X |
| t | Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? | 11 | | X |
| | If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or | | | |
| | distributed by the foundation in connection with the activities | | | |
| (| Did the foundation file Form 1120-POL for this year? | 10 | : | <u> </u> |
| 0 | f 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 . | | | |
| 6 | Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation | } | | |
| | managers. > \$0. | | | 1 |
| 2 | Has the foundation engaged in any activities that have not previously been reported to the IRS? | 2 | - | <u> </u> |
| | If "Yes," attach a detailed description of the activities | İ | | |
| 3 | Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or | 3 | | х |
| 4. | bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes Did the foundation have unrelated business gross income of \$1,000 or more during the year? | 48 | | $\frac{1}{x}$ |
| | b) If "Yes," has it filed a tax return on Form 990-T for this year? | | | + |
| | Was there a liquidation, termination, dissolution, or substantial contraction during the year? | A 40 | | X |
| · | If "Yes," attach the statement required by General Instruction T | | _ | + |
| 6 | Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: | ľ | ļ | |
| | By language in the governing instrument, or | ŀ | | |
| | By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law | } | 1 | 1 |
| | remain in the governing instrument? | 6 | | X |
| 7 | Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV | 7 | X | |
| | | | | |
| 8a | Enter the states to which the foundation reports or with which it is registered (see instructions) | | | |
| | <u>M</u> A | | } | |
| b | of 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 | 86 | X | + |
| 9 | | | | • |
| 40 | year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? If "Yes," complete Part XIV | 9 | | $\frac{X}{X}$ |
| ΙŲ | Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses | Form 9 9 | | |
| | | , villi V | | (-017) |

| | n 990-PF (2014) C/O BRUCE I WINTMAN | 27-6664 | <u>980</u> | | Page 5 |
|------------|---|---------------------------------------|------------|-----------|-------------|
| Pa | art VII-A Statements Regarding Activities (continued) | | | | |
| 11, | At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of | | | | |
| | section 512(b)(13)? If "Yes," attach schedule (see instructions) | | 11 | | <u>X</u> |
| 12 | Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory | privileges? | | | |
| | If "Yes," attach statement (see instructions) | | 12 | | _X_ |
| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? | | 13 | X | |
| | Website address ► N/A | | | | |
| 14 | The books are in care of ► BRUCE I WINTMAN Telephone no. | ► 413-56 | <u>7-1</u> | 007 | |
| | Located at ► 100 ASHFORD ROAD, LONGMEADOW, MA | ZIP+4 ▶ 01 | 106 | | |
| 15 | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here | | | | |
| | | 15_ | N | <u>/A</u> | |
| 16 | At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, | | , | Yes | No |
| | securities, or other financial account in a foreign country? | | 16 | | <u>X</u> _ |
| | See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22.1). If "Yes," enter the name | e of the | | | |
| | foreign country | | | | |
| Pa | art VII-B Statements Regarding Activities for Which Form 4720 May Be Required | | | 1 | |
| | File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. | | <u> </u> | Yes | No |
| 1a | a During the year did the foundation (either directly or indirectly): | | | | |
| | | es 🗶 No | | | |
| | (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) | | | ľ | |
| | | es X No | | , , | |
| | | es X No | | | |
| | | es X No | | 1 | |
| | (5) Transfer any income or assets to a disqualified person (or make any of either available | es 🗓 No | | | |
| | | es LALINO | | | |
| | (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.) | es X No | | | |
| | olf any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations | es Lalino | | Ì | |
| U | section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? | N/A | 1b | | |
| | Organizations relying on a current notice regarding disaster assistance check here | ► [] | | | |
| c | Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected | | | i | |
| Ĭ | before the first day of the tax year beginning in 2014? | | 1c | | X |
| 2 | Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation | | | | |
| | defined in section 4942(j)(3) or 4942(j)(5)): | ļ | . (| [| |
| 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 | ıg İ | | } | |
| | | es X No | 1 | } | |
| | If "Yes," list the years | ļ | | | |
| 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 | t] | | Ì | |
| | valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attack | 1 | | 1 | |
| | statement - see instructions.) | N/A | 2b | | |
| C | If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. | | · | } | |
| |) | | | [| |
| 3 a | Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time | | | l | |
| | | es 🗶 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 af | · · · · · · · · · · · · · · · · · · · | 1 | | |
| | May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to commissioner under section 4943(c)(7)) to commissioner under section 4943(c)(7)) to commissioner under section 4943(c)(7). | | 1 | Í | |
| | 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 | I | | ł | |
| _ | Form 4720, to determine if the foundation had excess business holdings in 2014) | N/A | 3b | | ٠, |
| | Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? | | 4a | | <u>X</u> |
| b | Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpos | e that | | ľ | 3 27 |
| | had not been removed from jeopardy before the first day of the tax year beginning in 2014? | | 4b | -PF (| <u>X</u> |
| | | rori | コココロ | -rr (| ZU 14) |

WINTMAN FAMILY CHARITABLE TRUST B Form 990-PF (2014) C/O BRUCE I WINTMAN 27-6664980 Page 6 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: Yes X No . (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, Yes X No any voter registration drive? Yes X No (3) Provide a grant to an individual for travel, study, or other similar purposes? (4) Provide a grant to an organization other than a charitable, etc., organization described in section Yes X No 4945(d)(4)(A)? (see instructions) (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for Yes X No the prevention of cruelty to children or animals? b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? N/A 5b Organizations relying on a current notice regarding disaster assistance check here c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained Yes No N/A expenditure responsibility for the grant? 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 Yes X No a personal benefit contract? 6b X b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870 Yes X No 7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? 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. (d) Contributions to employee benefit plans and deferred compensation (b) Title, and average hours per week devoted to position (e) Expense account, other (c) Compensation (If not paid, enter -0-) (a) Name and address allowances BRUCE WINTMAN TRUSTEE 100 ASHFORD ROAD LONGMEADOW, MA 01106 0.00 0 0. 0.

| 2 Compensation of five highest-paid employees (other than those inc | luded on line 1). If none, | enter "NONE." | | |
|---|---|------------------|---|---------------------------------------|
| (a) Name and address of each employee paid more than \$50,000 | (b) Title, and average hours per week devoted to position | (c) Compensation | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
| NONE | | | | |
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| | | | | |
| Total number of other employees paid over \$50,000 | | | | 0 |

Form **990-PF** (2014)

| Form 990-PF (2014) C/O BRUCE I WINTMAN | 27- | 6664980 Page 7 |
|---|------------------------|------------------|
| Part VIII Information About Officers, Directors, Trustees, Found Paid Employees, and Contractors (continued) | ation Managers, Highly | |
| 3 Five highest-paid independent contractors for professional services. If none, enter | er "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 | | <u>▶</u> 0 |
| Part IX-A Summary of Direct Charitable Activities | | |
| List the foundation's four largest direct charitable activities during the tax year. Include relevant state number of organizations and other beneficiaries served, conferences convened, research papers pro | | Expenses |
| 1 NOT APPLICABLE | | |
| | | • |
| | | 0. |
| 2 | | |
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| 3 | | |
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| 4 | | |
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| Part IX-B Summary of Program-Related Investments | | |
| Describe the two largest program-related investments made by the foundation during the tax year or | lines 1 and 2. | Amount |
| 1 N/A | | |
| | | _ |
| | | 0. |
| 2 | | |
| All other program-related investments. See instructions. | | |
| 3 | | |
| Total Add lines 1 through 3 | — | 0. |

423561 11-24-14 Form **990-PF** (2014)

Form 990-PF (2014) C/O BRUCE I WINTMAN 27-6664980 Page 8 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., purposes; Average monthly fair market value of securities 1a 2,045,502. Average of monthly cash balances 1b c Fair market value of all other assets 1c 2,045,502. d Total (add lines 1a, b, and c) 1d Reduction claimed for blockage or other factors reported on lines 1a and 0. 1c (attach detailed explanation) 1e Acquisition indebtedness applicable to line 1 assets 3 2.045.502. Subtract line 2 from line 1d 3 4 30,683. Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) 2,014,819. Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4 5 100,741. Minimum investment return. Enter 5% of line 5 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.) Minimum investment return from Part X, line 6 100,741. 630. Tax on investment income for 2014 from Part VI, line 5 2a Income tax for 2014. (This does not include the tax from Part VI.) 2b c Add lines 2a and 2b 2c Distributable amount before adjustments. Subtract line 2c from line 1 3 3 Recoveries of amounts treated as qualifying distributions 4 100. Add lines 3 and 4 5 Deduction from distributable amount (see instructions) 6 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 100 Part XII Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: 90,673. a Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 1a b Program-related investments - total from Part IX-B 1b Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes 2 Amounts set aside for specific charitable projects that satisfy the: 3 a Suitability test (prior IRS approval required) 3a b Cash distribution test (attach the required schedule) 3b 90,673. Qualifying distributions Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 4 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment

Adjusted qualifying distributions Subtract line 5 from line 4

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.

Form **990-PF** (2014)

90.

630.

income. Enter 1% of Part I, line 27b

Form 990-PF (2014) C/O BRUCE I WINTMAN

| | (a) | (b) | (c) | (d) |
|--|--------|---------------------|---------|---------------------------|
| 4. Book had been seed for 2014 for a Book VI | Corpus | Years prior to 2013 | 2013 | 2014 |
| 1 Distributable amount for 2014 from Part XI, line 7 | | | | 100,111. |
| 2 Undistributed income, if any, as of the end of 2014 | | | | |
| a Enter amount for 2013 only | | | 90,498. | |
| b Total for prior years: | | 0. | | |
| 3 Excess distributions carryover, if any, to 2014: | | | | |
| a From 2009 | | | | |
| b From 2010 | | | | |
| c From 2011 | | | | |
| d From 2012 | | | | |
| e From 2013 | | | | |
| f Total of lines 3a through e | 0. | | | |
| 4 Qualifying distributions for 2014 from | | | | |
| Part XII, line 4: ► \$ 90,673. | | | 00 400 | |
| a Applied to 2013, but not more than line 2a | | | 90,498. | |
| b Applied to undistributed income of prior | | 0. | | |
| years (Election required - see instructions) | | | | |
| c Treated as distributions out of corpus | _ | | | |
| (Election required - see instructions) | 0. | | | 175. |
| d Applied to 2014 distributable amount | | | | 1/3. |
| e Remaining amount distributed out of corpus | 0. | | | |
| 5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a)) | 0. | | | 0. |
| 6 Enter the net total of each column as indicated below: | | | | |
| a Corpus Add lines 3f, 4c, and 4e Subtract line 5 | 0. | | | |
| 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 | | | T i | |
| amount - see instructions | | 0. | | |
| e Undistributed income for 2013. Subtract line | | | | |
| 4a from line 2a. Taxable amount - see instr. | | | 0. | |
| f Undistributed income for 2014. Subtract | } | | | |
| lines 4d and 5 from line 1. This amount must | | , | | |
| be distributed in 2015 | | | | 99,936. |
| 7 Amounts treated as distributions out of | | | | |
| corpus to satisfy requirements imposed by | 1 | | į | |
| section 170(b)(1)(F) or 4942(g)(3) (Election | | | | |
| may be required - see instructions) | 0. | | | |
| 8 Excess distributions carryover from 2009 | | | | |
| not applied on line 5 or line 7 | 0. | | | |
| 9 Excess distributions carryover to 2015 | | | | |
| Subtract lines 7 and 8 from line 6a | 0. | | | |
| 10 Analysis of line 9: | | | | |
| a Excess from 2010 | } | } | | |
| b Excess from 2011 | | | | |
| c Excess from 2012 | | | | |
| d Excess from 2013 | 1 | | | |
| e Excess from 2014 423581 | | | | Form 990-PF (2014) |

the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

- a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed:
- 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)

Form 990-PF (2014) C/O BRUCE I WINTMAN

Part XV | Supplementary Information (continued)

27-6664980 Page 11

| 3. Grants and Contributions Paid During the Recipient | If recipient is an individual | rayment | I | |
|---|--|----------------------|----------------------------------|------------------------|
| Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of | Purpose of grant or contribution | Amount |
| a Paid during the year | or substantial contributor | recipient | | |
| a raid duling the year | | İ | | |
| | | | | |
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| MISCELLANEOUS CHARITABLE | | | | |
| ORGANIZATIONS - SEE ATTACHED | | | | 84,745, |
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| Tabl | | | — | 04.745 |
| Total b Approved for future payment | | | ▶ 3a | 84 745 |
| a Approved for future payment | | | 1 | |
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| NONE | | | | |
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| | | } | } | |
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| Total | | | > _3b | 0. |
| | | | For | m 990-PF (2014) |

Form 990-PF (2014) C/O BRUCE I WINTMAN

Part XVI-A Analysis of Income-Producing Activities

| F-A | Unrelated h | usiness income | Evaluated b | y section 512, 513, or 514 | |
|--|---|---------------------|--|----------------------------|---------------------------------------|
| Enter gross amounts unless otherwise indicated. | (a) Business | (b) Amount | (C) Exclu- sion | (d) Amount | (e) Related or exempt function income |
| 1 Program service revenue: | code | Amount | code | Amount | |
| a NONE | | | - - | | |
| b | _ | | 1 | | |
| c | _ | | | | |
| d | | | | | |
| e | _ _ | | | | |
| g Fees and contracts from government agencies | | | | | |
| 2 Membership dues and assessments | - | | | | |
| 3 Interest on savings and temporary cash | | | | | |
| investments | | | | | |
| 4 Dividends and interest from securities | | | 14 | 46,234. | |
| 5 Net rental income or (loss) from real estate: | | | | | |
| a Debt-financed property | | | 1-1- | | |
| b Not debt-financed property | | | | | |
| 6 Net rental income or (loss) from personal | | | | | |
| property | | | | | |
| 7 Other investment income | | | | | |
| 8 Gain or (loss) from sales of assets other | | | | | |
| than inventory | <u> </u> | | 14 | 3,624. | 13,513. |
| 9 Net income or (loss) from special events | | | | | |
| 10 Gross profit or (loss) from sales of inventory | | | | | |
| 11 Other revenue: | | | 1 | , | |
| a | | | | | |
| b | | | | | |
| c | | | J | | |
| d | | | | | |
| e | _ | | | | |
| 12 Subtotal. Add columns (b), (d), and (e) | | 0. | | 49,858. | 13,513. |
| 13 Total Add line 12, columns (b), (d), and (e) | | | | 13 | 63,371. |
| (See worksheet in line 13 instructions to verify calculations. |) | | | ·· <u></u> ··· | |
| Part XVI-B Relationship of Activities | to the Accom | plishment of E | xempt Pu | ırposes | |
| Line No. Explain below how each activity for which in | | | A contributed | importantly to the accomp | lishment of |
| the foundation's exempt purposes (other the | an by providing funds | for such purposes). | | | |
| NOT APPLICABLE | | | | | |
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| 423621 11-24-14 | | | | | Form 990-PF (2014) |

| Earm 00 | n_DE /2 | | - | | TABLE TRUST | В | 27 | 6664090 | Dogo 46 |
|-----------------|---------|---|------------------------|--------------------|---|-------------------|-------------------------------|--------------------------|-------------|
| Form 99 Part | | | RUCE I WI | | and Transactions | and Relatio | | -6664980 oncharitable | Page 13 |
| | | Exempt Organ | | .0.0.0 | | ana molado | nompo mininto | monantable | |
| 1 Dic | the or | | | of the follows | ng with any other organizati | on described in s | section 501(c) of | | Yes No |
| | | • | | | 27, relating to political orgai | | ., | 1 [| |
| | | from the reporting found | | | | | | | |
| (1) | Cash | , - | | · | | | | 1a(1) | X |
| | | assets | | | | | | 1a(2) | X |
| | | sactions: | | | | | | | |
| (1) | Sales | of assets to a noncharita | ble exempt organiza | ition | | | | 16(1) | X |
| (2) | Purch | nases of assets from a no | ncharitable exempt | organization | | | | 1b(2) | X |
| (3) | Renta | al of facilities, equipment, | or other assets | | | | | 1b(3) | X |
| (4) | Reim | bursement arrangements | | | | | | 1b(4) | X |
| (5) | Loans | s or loan guarantees | | | | | | 1b(5) | X |
| (6) | Perfo | rmance of services or me | embership or fundra | ising solicitation | ons | | | 1b(6) | X |
| c Sh | aring o | f facilities, equipment, ma | uling lists, other ass | ets, or paid em | ployees | | | 1c | X |
| d If t | he ansv | ver to any of the above is | "Yes," complete the | following sch | edule. Column (b) should al | ways show the fa | air market value of the | goods, other asse | ts, |
| | | | | | ed less than fair market vali | | | | |
| col | umn (d |) the value of the goods, | other assets, or serv | vices received. | | | | | |
| (a) Line n | 0 | (b) Amount involved | (c) Name o | f noncharitable | e exempt organization | (d) Descrip | otion of transfers, transacti | ons, and sharing arra | ngements |
| | | | | N/A | | | | | _ |
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| | | idation directly or indirect 501(c) of the Code (other | • | - | or more tax-exempt organi ion 527? | zations described | d | Yes | X No |
| <u>b if "\</u> | es," co | mplete the following sche | | | | | | | |
| | | (a) Name of org | anization | | (b) Type of organization | | (c) Description of re | elationship | |
| | | N/A | | | | | | | |
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| Sian | | | | | ig accompanying schedules and n taxpayer) is based on all inform | | | May the IRS dis | cuss this |
| Sign Here | | X 11/2 | | => | 1 2/02/- | | | shown below (s | ee instr)? |
| | Sign | ature of officer or trustee | | | Date 18 | | 1725 | X Yes | No L |
| | Jign | Print/Type preparer's na | me | Preparer's s | Date | Title | Check If | PTIN | |
| | İ | i iniviye preparer 5 lid | enië | i ichaici S S | gnature | Date | self- employed | 1114 | |
| Paid | } | KEITH E.OA | ጥፑሮ | r e t mu | ድ ለአጥድሮ | | Son employed | D004405 | 07 |
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Form **990-PF** (2014)

Firm's EIN ▶ 98-0432569

Phone no. 678-299-3756

Use Only

Preparer Firm's name ▶ DELOITTE TAX SERVICES INDIA PVT LTD

Firm's address ► SURVEY39 MEENAKSHI PARK, GACHIBOWLI HYDERABAD, AP INDIA 500032

WINTMAN FAMILY CHARITABLE TRUST B EIN 27-6654980 12/31/2014

| 379 414 411 425 | Abortion Rights Fund Abraham Fund | NONE | | PUBLIC WELFARE | 250 |
|--------------------------|---------------------------------------|------|----------------|----------------|--------|
| 411 425 | | NONE | | | |
| 425 | A C 1 | NONE | | PUBLIC WELFARE | 1,250 |
| | ACLU | NONE | PUBLIC CHARITY | PUBLIC WELFARE | 500 |
| 40.4 | ADL | NONE | PUBLIC CHARITY | PUBLIC WELFARE | 1,000 |
| 404 | Aesculapian Club | NONE | PUBLIC CHARITY | PUBLIC WELFARE | 50 |
| 433 | AFSH | NONE | PUBLIC CHARITY | MEDICAL | 250 |
| 432 | Aid Still Required | NONE | PUBLIC CHARITY | PUBLIC WELFARE | 1,000 |
| 367 | AIDS Foundation of Western Mass | NONE | PUBLIC CHARITY | MEDICAL | 1,000 |
| 378 | AJW Service | NONE | PUBLIC CHARITY | PUBLIC WELFARE | 500 |
| 388 | Am Natural History Museum | NONE | PUBLIC CHARITY | PUBLIC WELFARE | 600 |
| . 408 | Amnesty Int'l | NONE | PUBLIC CHARITY | PUBLIC WELFARE | 1,500 |
| 419 | CHD Big Brothers Big Sisters of Hamps | NONE | PUBLIC CHARITY | PUBLIC WELFARE | 100 |
| 366 | Cliniquita | NONE | PUBLIC CHARITY | PUBLIC WELFARE | 250 |
| 383 | Com Research Initiative NE | NONE | | PUBLIC WELFARE | 250 |
| 431 | Doctors Without Borders | NONE | PUBLIC CHARITY | PUBLIC WELFARE | 1,000 |
| 390 | Drama Studio | NONE | PUBLIC CHARITY | PUBLIC WELFARE | 250 |
| 374 | Finca Intnl | NONE | PUBLIC CHARITY | PUBLIC WELFARE | 50 |
| 372 | Food Bank | NONE | | PUBLIC WELFARE | 1,000 |
| 334 | Forest Park | NONE | | PUBLIC WELFARE | 340 |
| 395 | Friends of the Homeless | NONE | | PUBLIC WELFARE | 750 |
| 380 | Greenpeace | NONE | | PUBLIC WELFARE | 500 |
| 405 | Gray House | NONE | | PUBLIC WELFARE | 250 |
| 416 | Habitat for Humanity | NONE | | PUBLIC WELFARE | 500 |
| 435 | Harvard College | NONE | PUBLIC CHARITY | | 100 |
| 396 | Hebrew Free Loan Assn | NONE | | PUBLIC WELFARE | 50 |
| 436 | Heifer Fund | NONE | | PUBLIC WELFARE | 250 |
| | | NONE | PUBLIC CHARITY | | 800 |
| 359, 364 | Hentage Acadamy | NONE | PUBLIC CHARITY | | 500 |
| 368 | Hillel | NONE | | | 500 |
| 437 | HIV/AIDS law consortium | NONE | PUBLIC CHARITY | | 500 |
| 400 | HMS | | PUBLIC CHARITY | | 500 |
| 371 | Holocaust Museum | NONE | PUBLIC CHARITY | | |
| 413 | Intl Rescue Committee | NONE | PUBLIC CHARITY | | 500 |
| 392 | JCC _ | NONE | PUBLIC CHARITY | | 1,000 |
| 421 | Jewish Family Service | NONE | | PUBLIC WELFARE | 3,500 |
| 422 | Jewish Genatric Service | NONE | | PUBLIC WELFARE | 250 |
| 401 | Links to Library | NONE | PUBLIC CHARITY | | 1,000 |
| 438 | MEMRI | NONE | | PUBLIC WELFARE | 250 |
| 391 | Metropolitan Museum of Art | NONE | | PUBLIC WELFARE | 210 |
| 412 | Mother Woman Fund | NONE | | PUBLIC WELFARE | 100 |
| 375 | Museum of Modern Art | NONE | | PUBLIC WELFARE | 175 |
| 439 | My Jewish Learning | NONE | | PUBLIC WELFARE | 72 |
| 402 | Natl Conference for Community and Ju- | NONE | PUBLIC CHARITY | CULTURAL | 1,000 |
| 442 | Natl Education Assist Dog Services | NONE | PUBLIC CHARITY | EDUCATION | 250 |
| 409 | Natl Museum Am Jewish Hx | NONE | PUBLIC CHARITY | EDUCATION | 100 |
| 407 | Natl Park Assn | NONE | PUBLIC CHARITY | CULTURAL | 50 |
| 420 | Natl Resources Defense Council | NONE | PUBLIC CHARITY | PUBLIC WELFARE | 250 |
| 428 | New Israel Fund | NONE | PUBLIC CHARITY | PUBLIC WELFARE | 4,000 |
| 370, 418, 443 | NPR/WFCR | NONE | PUBLIC CHARITY | PUBLIC WELFARE | 40,500 |
| 430 | Nonhuman Rights Project | NONE | PUBLIC CHARITY | PUBLIC WELFARE | 1,000 |
| 394 | Open Pantry Com Svcs Inc | NONE | PUBLIC CHARITY | PUBLIC WELFARE | 500 |
| 398 | OREF | NONE | PUBLIC CHARITY | PUBLIC WELFARE | 250 |
| 440 | Partners in Health | NONE | PUBLIC CHARITY | EDUCATION | 1,000 |
| 377 | Pesticide Action Network | NONE | PUBLIC CHARITY | PUBLIC WELFARE | 1,000 |
| 399 | Phillips Academy | NONE | PUBLIC CHARITY | PUBLIC WELFARE | 1,000 |
| 381 | Planned Parenthood MA | NONE | PUBLIC CHARITY | MEDICAL | 500 |
| 427 | Putney School | NONE | PUBLIC CHARITY | EDUCATION | 1,000 |
| 361 | Rachel's Table | NONE | PUBLIC CHARITY | EDUCATION | 100 |
| 384 | Rails to Trails | NONE | PUBLIC CHARITY | PUBLIC WELFARE | 100 |
| 382 | Red Cross | NONE | | PUBLIC WELFARE | 100 |
| 397 | Salvation Army | NONE | | PUBLIC WELFARE | 50 |
| 424 | Sierra Club | NONE | | PUBLIC WELFARE | 1,000 |
| 376 | Smile Train | NONE | | PUBLIC WELFARE | 100 |
| 426 | So Poverty Law Ctr | NONE | | PUBLIC WELFARE | 1,000 |
| 386 | Special Olympics | NONE | | PUBLIC WELFARE | 100 |
| 365 | Spfld Public Forum | NONE | | PUBLIC WELFARE | 150 |
| 403 | Spfld Rescue Mission | NONE | | PUBLIC WELFARE | 100 |
| 389 | Temple Beth El | NONE | PUBLIC CHARITY | | 500 |
| | Trustees of Reservations | NONE | PUBLIC CHARITY | | 67 |
| 423 | Union of Concerned Scientists | NONE | | PUBLIC WELFARE | 250 |
| 407 | | | | PUBLIC WELFARE | 2,000 |
| 429 | United Way | NONE | | | 2,000 |
| 410 | USO | NONE | | PUBLIC WELFARE | |
| 417 | Wesleyan University | NONE | PUBLIC CHARITY | | 1,831 |
| 385 | Women's Fund of W MA | NONE | | PUBLIC WELFARE | 1,000 |
| 387 | Yiddish Book Center | NONE | | PUBLIC WELFARE | 250 |
| | | NONE | PUBLIC CHARITY | EDUÇATION | • |

| FORM 990-PF | DIVIDENDS | AND INTE | REST | FROM SECUR | ITIES S | STATEMENT : |
|---|-----------------|------------------------------|------|-----------------------------|----------------------------------|-------------------------------|
| SOURCE | GROSS AMOUNT | CAPITAI GAINS DIVIDENI | | (A) REVENUE PER BOOKS | (B) NET INVEST- MENT INCOM | |
| VANGUARD | 49,858. | 3,62 | 24. | 46,234. | 46,234 | 46,234 |
| TO PART I, LINE 4 | 49,858. | 3,62 | 24. | 46,234. | 46,234 | 46,234 |
| FORM 990-PF | | ACCOUNT | NG F | EES | | STATEMENT 2 |
| DESCRIPTION | | (A) EXPENSES PER BOOKS | | (B) INVEST- T INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLI PURPOSES |
| TAX PREPARATION TAX PREPARATION | | 3,016. 2,912. | | 0. | 0. | - |
| TO FORM 990-PF, PG 1, | LN 16B | 5,928 | | 0. | 0. | 5,928 |
| FORM 990-PF | | TAX | ŒS | | | STATEMENT |
| DESCRIPTION | | (A) EXPENSES PER BOOKS | | (B) INVEST- T INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLI PURPOSES |
| FOREIGN TAXES MASSACHUSETTS TAXES FEDERAL TAXES | _ | 331. 35. 601. | | 331. 0. 0. | 0. 0. 0. | . 0 |
| TO FORM 990-PF, PG 1, | LN 18 | 967. | | 331. | 0. | . 0. |
| FORM 990-PF | | CORPORAT | E ST | OCK | S | STATEMENT 4 |
| | | | | BOO | F K VALUE | FAIR MARKET VALUE |
| DESCRIPTION | | | | | | |
| DESCRIPTION BROKERAGE ASSETS | | | | | 10,303. | 30,178. |

| FORM 990-PF OTH | ER INVESTMENTS | | STATEMENT 5 |
|------------------------------------|---------------------|------------|------------------------|
| DESCRIPTION | VALUATION METHOD | BOOK VALUE | FAIR MARKET VALUE |
| VANGUARD FUNDS VANGUARD FUNDS | COST | 1,389,746. | 1,860,535. 160,258. |
| TOTAL TO FORM 990-PF, PART II, LIN | IE 13 | 1,542,068. | 2,020,793. |