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Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No. 1545-0052

2014

Open to Public Inspection

For calendar year 2014 or tax year beginning January 1, 2014, and ending December 31, 2014

Name of foundation The Daniel Family Charitable Foundation		A Employer identification number 34 - 7184819
Number and street (or P O box number if mail is not delivered to street address) 80 Loring Road	Room/suite	B Telephone number (see instructions) 617 - 835-3197
City or town, state or province, country, and ZIP or foreign postal code Weston, MA 02493		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input checked="" type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 478,420	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> 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)
Schedule 1					
1	Contributions, gifts, grants, etc., received (attach schedule)	100,000			
2	Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	6,452	6,452	6,452	
5a	Gross rents				
b	Net rental income or (loss)				
Schedule 2					
6a	Net gain or (loss) from sale of assets not on line 4b				
b	Gross sales price for all assets on line 6a				
7	Capital gain net income (from Part IV, line 2)		24,365		
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)				
Schedule 3					
11	Other income (attach schedule)				
Schedule 4					
12	Total. Add lines 1 through 11	106,452	30,817	6,452	
Operating and Administrative Expenses					
13	Compensation of officers, directors, trustees, etc.	0	0	0	0
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule)				
b	Accounting fees (attach schedule)				
c	Other professional fees (attach schedule)				
Schedule 5					
17	Interest				
Schedule 6					
18	Taxes (attach schedule) (see instructions)				
Schedule 7					
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
Schedule 8					
23	Other expenses (attach schedule)				
24	Total operating and administrative expenses. Add lines 13 through 23	0	0	0	0
Schedule 9					
25	Contributions, gifts, grants paid	25,750			
26	Total expenses and disbursements. Add lines 24 and 25	25,750	0	0	0
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	80,702			
b	Net investment income (if negative, enter -0-)		30,817		
c	Adjusted net income (if negative, enter -0-)			6,452	

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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	353,793		
	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)		478,420	478,420
	b Investments—corporate stock (attach schedule)			
	c Investments—corporate bonds (attach schedule)			
Liabilities	11 Investments—land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation (attach schedule) ▶			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)			
	14 Land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation (attach schedule) ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	353,793	478,420	478,420
	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons (attach schedule)			
	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 ▶ <input type="checkbox"/> 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 ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	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	353,793	478,420	
Net Assets or Fund Balances	30 Total net assets or fund balances (see instructions)	353,793	478,420	
	31 Total liabilities and net assets/fund balances (see instructions)	353,793	478,420	

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	353,793
2 Enter amount from Part I, line 27a	2	80,702
3 Other increases not included in line 2 (itemize) ▶ Schedule Change in Investment Value	3	43,925
4 Add lines 1, 2, and 3	4	478,420
5 Decreases not included in line 2 (itemize) ▶ Schedule	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	478,420

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a Common Stock		Purchased	7/1/2014	9/1/2014
b Common Stock		Purchased	1/1/2014	7/1/2014
c Common Stock		Purchased	1/1/2014	9/4/2014
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 88,762		88,395	367
b 4,399		4,381	18
c 276,380		252,400	23,980
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			367
b			18
c			23,980
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	24,365
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 the 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	24,500	274,637	8.92%
2012	22,657	301,782	7.51%
2011		302,322	.00%
2010	19,105	277,130	6.89%
2009	44,846	306,028	14.65%

2 Total of line 1, column (d)	2	37.97%
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	7.59%
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	367,225
5 Multiply line 4 by line 3	5	27,887
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	308
7 Add lines 5 and 6	7	28,195
8 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.	8	0

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1		616
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		616
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		616
6	Credits/Payments:			
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a		
b	Exempt foreign organizations—tax withheld at source	6b		
c	Tax paid with application for extension of time to file (Form 8868)	6c		
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments. Add lines 6a through 6d	7		0
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		616
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		0
11	Enter the amount of line 10 to be: Credited to 2015 estimated tax Refunded	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	N/A
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the 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	N/A
c Did the foundation file Form 1120-POL for this year?	1c	N/A
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ _____ (2) On foundation managers. ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ _____		
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	N/A
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	N/A
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	N/A
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	N/A
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	N/A
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	N/A
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	N/A
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶		
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 <i>General Instruction G</i> ? <i>If "No," attach explanation</i>	8b	N/A
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	N/A
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	N/A

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)	Schedule	11	N/A
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	N/A
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A		13	N/A
14	The books are in care of ► BRUCE B. DANIEL, TRUSTEE Telephone no. ► 617-835-3197 Located at ► 80 LORING ROAD, WESTON, MA ZIP+4 ► 2,493			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here.	► <input type="checkbox"/>		
	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	N/A
	See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22.1). If "Yes," enter the name of the foreign country ►			

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? <input type="checkbox"/> Yes <input type="checkbox"/> No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input type="checkbox"/> No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input type="checkbox"/> No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input type="checkbox"/> 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)? <input type="checkbox"/> Yes <input type="checkbox"/> 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.) <input type="checkbox"/> Yes <input type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b	N/A
	Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>		
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	N/A
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? <input type="checkbox"/> Yes <input type="checkbox"/> No		
	If "Yes," list the years ► 20____, 20____, 20____, 20____		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b	N/A
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? <input type="checkbox"/> Yes <input type="checkbox"/> 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	N/A
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	N/A
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	N/A

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 ☒ N/A ☐ 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 ☒ N/A ☐ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ N/A ☐ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions) ☐ Yes ☒ N/A ☐ 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 ☒ N/A ☐ 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**

N/A

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 ☒ N/A ☐ 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 ☒ N/A ☐ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?**6b**

N/A

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 ☒ N/A ☐ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?**7b**

N/A

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
BRUCE B. DANIEL 80 LORING ROAD, WESTON, MA 02493	TRUSTEE 1	0	0	0
SUSAN M. DACEY 80 LORING ROAD, WESTON, MA 02493	TRUSTEE 0	0	0	0

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

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

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
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	N/A	0
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	N/A	0
2		
All other program-related investments. See instructions		
3		
Total. Add lines 1 through 3		

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	
b	Average of monthly cash balances	1b	372,817
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	372,817
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	372,817
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	5,592
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	367,225
6	Minimum investment return. Enter 5% of line 5	6	18,361

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	18,361
2a	Tax on investment income for 2014 from Part VI, line 5	2a	616
b	Income tax for 2014. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	616
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	17,745
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	17,745
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	17,745

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	
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
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	
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	

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				17,745
2 Undistributed income, if any, as of the end of 2014:				
a Enter amount for 2013 only				
b Total for prior years: 20 <u>20</u> , 20 <u>20</u> , 20 <u>20</u>				
3 Excess distributions carryover, if any, to 2014:				
a From 2009	15,764			
b From 2010	5,248			
c From 2011				
d From 2012	7,569			
e From 2013				
f Total of lines 3a through e	28,581			
4 Qualifying distributions for 2014 from Part XII, line 4: ► \$				
a Applied to 2013, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions)				
c Treated as distributions out of corpus (Election required—see instructions)				
d Applied to 2014 distributable amount				
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)	17,745			17,745
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	10,836			
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				
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)				
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	10,836			
10 Analysis of line 9:				
a Excess from 2010	3,267			
b Excess from 2011				
c Excess from 2012	7,569			
d Excess from 2013				
e Excess from 2014				

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

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

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

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

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see instructions.)**1 Information Regarding Foundation Managers:**

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

Bruce B. Daniel, Susan M. Dacey

- 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 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:

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i>				
See Schedule	no	501c3	Charitable donations	0
Total			▶	3a
b <i>Approved for future payment</i>				
Total			▶	3b

		Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		
a	Transfers from the reporting foundation to a noncharitable exempt organization of:		
	(1) Cash	1a(1)	N/A
	(2) Other assets	1a(2)	N/A
b	Other transactions:		
	(1) Sales of assets to a noncharitable exempt organization	1b(1)	N/A
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)	N/A
	(3) Rental of facilities, equipment, or other assets	1b(3)	N/A
	(4) Reimbursement arrangements	1b(4)	N/A
	(5) Loans or loan guarantees	1b(5)	N/A
	(6) Performance of services or membership or fundraising solicitations	1b(6)	N/A
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c	N/A
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.		

[illegible]

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? ☐ N/A ☐ Yes ☐ No

b If "Yes," complete the following schedule.

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

**Sign
Here**

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

Signature of officer or trustee

Date _____

Title

May the IRS discuss this return with the preparer shown below (see instructions)? ☐ Yes ☐ No

**Paid
Preparer
Use Only**

Print/Type preparer's name

Preparer's signature

Date _____

Check ☐ if self-employed

PTIN

Firm's name ▶

Firm's EIN ▶ -- • -----

Firm's address ►

Phone no -

Attachments to IRS Form 990-PF
The Daniel Family Charitable Foundation
34-7184819
Tax Year 2014

Schedule 1: Part I, Line 1 - Contributions, Gifts, Grants, etc. Received

Description		Amount
1	Contribution from Bruce B Daniel and Susan Dacey	100,000
2		
3		
4		
5		
6		
7		
8		
9		
10		
Total		100,000

Attachments to IRS Form 990-PF
The Daniel Family Charitable Foundation
34-7184819
Tax Year 2014

Schedule 9: Part I, Line 25 - Contributions, Gifts, Grants Paid

From detail below	Cash Amount	Property Other than Cash	Total
Paid during the year	25,750	0	25,750
Approved for future payment	0	0	0
Total	25,750	0	25,750

Paid During the Year:

Class of Activity:	Donee Name	Donee Address	Cash Amount	Property Other than Cash (1)	Relationship to Disqualified Persons (2)	Organizational Status of Donee (3)
1 1	Boston CASA	POB 5426, Boston, MA 02114	500			501c3
1 2	Boston Partners In Education	44 Farnsworth Street, Boston, MA 02108	500			501c3
1 3	Camp Sunshine	35 Acadia Road, Casco, ME 04015	1,000			501c3
1 4	Cape Abilities	895 Mary Dunn Road, Hyannis, MA 01901	500			501c3
1 5	Charlestown Boys and Girls Club	15 Green Street, Boston, MA 02129	1,000			501c3
1 6	Cystic Fibrosis Foundation	220 North Main St #104, Natick, MA 01907	3,450			501c3
1 7	Fahey Foundation		500			501c3
	Total		7,450	0		
2 1	First Literacy	160 Boylston Street, Boston, MA 02116	500			501c3
2 2	Good Sports	1515 Hancock Street, Quincy, MA 02170	500			501c3
2 3	Greater Boston Food Bank	99 Atkinson Street, Boston, MA 02109	5,000			501c3
2 4	Homeboy Industries		100			501c3
2 5	Joslin Diabetes Center	1 Joslin Place, Boston, MA 02215	1,500			501c3
2 6	Pine Street Inn	444 Harrison Ave, Boston MA 02118	1,000			501c3
2 7	Rosie's Place	889 Harrison Ave, Boston, MA 02118	1,000			501c3
	Total		9,600	0		
3 1	St Elizabeth Seto Foundation	300 Corporate Blvd, South Yonkers, NY 10585	500			501c3
3 2	The Family Pantry	133 Queen Anne Road, Harwich, MA 02645	1,000			501c3
3 3	The Salvation Army	POB 55876, Boston, MA 02118	1,000			501c3
3 4	The Smile Train	POB 96231, Washington, DC 20090	1,000			501c3
3 5	WBUR	890 Commonwealth Ave, Boston Un	1,000			501c3
3 6	Weston Metco Scholarship Fund	49 Bay State Road, Weston, MA 02457	1,000			501c3
3 7	Natural Resources Defense Cour		1,000			501c3
	Total		6,500	0		
4 1	NAMI of Cape Cod	5 Mark Lane, Hyannis, MA 02601	1,100			501c3
4 2	National MS Society		100			501c3
4 3	NRDC	POB 1830, Merrifield, VA 22116-8030	1,000			501c3
	Total		2,200	0		

Total amount paid for which the foundation exercised
expenditure responsibility

Total Paid During the Year

25,750 0

- (1) Additional information for property other than cash included on continuation sheet
(2) Relationship of donee if related by blood, marriage, adoption or employment (including children of employees) to any disqualified person
(3) The organizational status of donee (e g , public charity—an organization described in section 509(a)(1), (2), or (3))

Attachments to IRS Form 990-PF
The Daniel Family Charitable Foundation
34-7184819
Tax Year 2014

Schedule 12: Part II, Line 10 - Investments—Government Obligations, Corporate Stocks and Bonds

Line 10a - Investments - U.S. and state government obligations	Valued at Cost or Market Value	End of Year	
		Book Value	Fair Market Value
Total U.S. Government obligations			
1 Fidelity Municipal Money Market	478,420	478,420	478,420
Total		478,420	478,420

Attachments to IRS Form 990-PF
The Daniel Family Charitable Foundation
34-7184819
Tax Year 2014

Schedule 20: Part III, Line 3 - Other Increases Not Included in Line 2

Description	Amount
1 Change in investment value as of 12 31 14	43,925
Total	43,925



FIDELITY BROKERAGE SERVICES LLC
PO BOX 673000
DALLAS, TX 75267-3000

00005611 02 AV 0 378 05005611 Envelope 9001 070281 06



DANIEL FAMILY CHARITABLE FNDTN
BRUCE BENNETT DANIEL
80 LORING RD
WESTON MA 02493-2472

2014 TAX REPORTING STATEMENT

DANIEL FAMILY CHARITABLE FNDTN

Account No. Z83-127860 Customer Service: 800-544-5704
Recipient ID No. 00004819 Payer's Fed ID Number: 04-3523567

Payer's Name and Address
NATIONAL FINANCIAL SERVICES LLC
499 WASHINGTON BLVD
JERSEY CITY, NJ 07310

Form 1099-DIV*

2014 Dividends and Distributions

Copy B for Recipient
(OMB No. 1545-0110)

1a Total Ordinary Dividends	4,034.20	6 Foreign Tax Paid	0.00
1b Qualified Dividends	2,377.91	7 Foreign Country or U.S. Possession	0.00
2a Total Capital Gain Distributions (Includes 2b - 2d)	22.77	8 Cash Liquidation Distributions	0.00
2b Unrecap. Sec 1258 Gain	0.00	9 Non-Cash Liquidation Distributions	0.00
2c Section 1202 Gain	0.00	10 Exempt Interest Dividends	13.34
2d Collectibles (28%) Gain	0.00	11 Specified Private Activity Bond Interest Dividends	3.57
3 Nondividend Distributions	0.00	12 State	0.00
4 Federal Income Tax Withheld	0.00	13 State Identification No.	0.00
5 Investment Expenses	0.00	14 State Tax Withheld	0.00

Form 1099-INT*

2014 Interest Income

Copy B for Recipient
(OMB No. 1545-0112)

1 Interest Income	0.00	8 Tax-Exempt Interest	0.00
2 Early Withdrawal Penalty	0.00	9 Specified Private Activity Bond Interest	0.00
3 Interest on U.S. Savings Bonds and Treas. Obligations	0.00	10 Market Discount	0.00
4 Federal Income Tax Withheld	0.00	11 Bond Premium	0.00
5 Investment Expenses	0.00	12 Tax-Exempt Bond CUSIP no.	0.00
6 Foreign Tax Paid	0.00	13 State	0.00
7 Foreign Country or U.S. Possession	0.00	14 State Identification No	0.00
		15 State Tax Withheld	0.00

* This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.



2014 TAX REPORTING STATEMENT

DANIEL FAMILY CHARITABLE FNDTN
Account No. Z83-127850 Customer Service: 800-544-5704
Recipient ID No. 000004819 Payer's Fed ID Number: 04-3523567

Form 1099-MISC*

2014 Miscellaneous Income

Copy B for Recipient
(OMB No. 1545-0115)

2 Royalties	0.00	16 State Tax Withheld	0.00
3 Other Income	0.00	17 State/Payer's State No.	
4 Federal Income Tax Withheld	0.00	18 State Income	0.00
8 Substitute Payments in Lieu of Dividends or Interest	0.00		

Summary of 2014 Proceeds From Broker and Barter Exchange Transactions

Sales Price of Stocks, Bonds etc	453,557.15
Federal Income Tax Withheld	0.00
State/Payer's State No	
State Tax Withheld	0.00

Proceeds from each of your security transactions are reported individually to the IRS. Refer to Form 1099-B section of this statement. Report proceeds individually for each security on the appropriate IRS tax return.

Summary of 2014 Original Issue Discount

Total Original Issue Discount	0.00
Total Original Issue Discount on U.S. Treasury Obligations	0.00

Original Issue Discount (OID) amounts are reported individually to the IRS. Refer to the Form 1099-OID pages in this statement, if applicable.

Dividends and other distributions sometimes must be reclassified by the issuer. As a result, we may be required to send you a corrected Tax Reporting Statement that may affect the information you report on your tax return.

* This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.





2014 TAX REPORTING STATEMENT

DANIEL FAMILY CHARITABLE FNDTN
Account No. 283-127860 Customer Service: 800-544-5704
Recipient ID No. 00-4819 Payer's Fed ID Number: 04-3523567

FORM 1099-B*

2014 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB No. 1545-0715

Short-term transactions for which basis is reported to the IRS --report on Form 8949 with Box A checked and/or Schedule D, Part I
Proceeds are reported as gross proceeds unless otherwise indicated (a). (This Label is a Substitute for Boxes 2, 3, 5 & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

1a Description of property, Stock or Other Symbol, CUSIP	Quantity	1b Date Acquired	1c Date Sold or Disposed	1d Proceeds	1e Cost or Other Basis (b)	1f Code, if Any (c) 1g Adjustments	Gain/Loss (-)	4 Federal Income Tax Withheld	14 State Income Tax Withheld	16 State Income Tax Withheld
FIDELITY SELECT AIR TRANSPORT, FSAIX, 316380798										
Sale	1,335.070	07/01/14	09/16/14	88,782.16	88,395.00		387.16			
FIDELITY STRATEGIC INCOME, FSICX, 31638R303										
Sale	389.954	various	07/01/14	4,398.68	4,381.49		17.19			
SPARTAN 500 INDEX FDADVANTAGE CLASS, FUSVX, 315911701										
Sale	3,887.201	various	09/04/14	276,379.99	252,400.06		23,979.93			
TOTALS				369,580.83	345,176.55			0.00		
Box A Short-Term Realized Gain										
Box A Short-Term Realized Loss										
Box A Wash Sale Loss Disallowed										
Box A Market Discount										

* This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.



2014 TAX REPORTING STATEMENT

DANIEL FAMILY CHARITABLE FNDTN Account No Z83-127860 Customer Service: 800-544-5704
Recipient ID No. 00-4818 Payer's Fed ID Number 04-3523567

FORM 1099-B*

Copy B for Recipient OMB No. 1545-0715

2014 Proceeds from Broker and Barter Exchange Transactions

Long-term transactions for which basis is reported to the IRS—report on Form 8949 with Box D checked and/or Schedule D, Part II
Proceeds are reported as gross proceeds unless otherwise indicated (a). (This label is a Substitute for Boxes 2, 3, 5 & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

1a Description of property, Stock or Other Symbol, CUSIP	Quantity	1b Date Acquired	1c Date Sold or Disposed	1d Proceeds	1e Cost or Other Basis (b)	1f Code, if Any (c) 1g Adjustments	4 Federal Income Tax Withheld	14 State Tax	16 State Withheld
FIDELITY STRATEGIC INCOME, FSICX, 31638R303									
Sale	7,446.482	various	07/01/14	83,996.32	83,667.91				328.41
TOTALS				83,996.32	83,667.91		0.00		0.00
Box D Long-Term Realized Gain							328.41		
Box D Long-Term Realized Loss						0.00	0.00		
Box D Wash Sale Loss Disallowed									
Box D Market Discount						0.00	0.00		

For any transaction listed on Form 1099-B in a section indicating that "basis is reported to the IRS", we are reporting to the IRS. 1a Description of Property, 2 type of gain or loss (i.e. short-term or long-term), 3 basis reported to IRS, 6 Gross or Net Proceeds, and columns 1b, 1c, 1d, 1e, 1f, 1g, 4, 7, 14, 15 and 16. We are not reporting to the IRS, the Action, the Gain / Loss, and all subtotals and totals.

For any section 1256 option contracts we are reporting to the IRS: 1a Description of Property and totals for boxes 8, 9, 10 and 11.

For any transaction listed on Form 1099-B in a section indicating that "basis is not reported to the IRS", we are reporting to the IRS. 1a Description of Property, 5 Noncovered security, 6 Gross or Net Proceeds, and columns 1c, 1d, 4, 14, 15 and 16. We are not reporting to the IRS: 1c type of gain or loss (i.e. short-term or long-term), the Action, the Gain / Loss, columns 1b, 1e, 1f, 1g, 2, 3 and 7 and all subtotals and totals.

Although Fidelity makes every effort to provide accurate information, please bear in mind that you, the taxpayer, are ultimately responsible for the accuracy of your tax returns.

(b) Cost or other basis provided may include adjustments including, but not limited to, dividend reinvestment, return of capital/principal, wash sale disallowed, amortization, accretion, acquisition premium, bond premium, market discount, market premium, and option premium.

(c) D = Market Discount, W = Wash Sale

Amortization, accretion, and similar adjustments to cost basis are not provided for short-term instruments, unit investment trusts, or securities of foreign issuers.

* This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.





2014 SUPPLEMENTAL INFORMATION

DANIEL FAMILY CHARITABLE FNDTN Account No. 283-127860 Customer Service: 800-544-5704
Recipient ID No. ***4819 Payer's Fed ID Number 04-3523567

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

To see an interactive guide to your Fidelity Tax Statement visit Fidelity.com/taxstatementguides.

Details of 1099-DIV Transactions

Total Ordinary Dividends and Distributions Detail

Description, Symbol, CUSIP		1a Total Ordinary Dividends (Includes 1b)	Dividend Distributions	Short-Term Capital Gain	1b Qualified Dividends	10 Exempt Interest Dividends	11 Specified Private Activity Bond Interest Dividends	6 Foreign Tax Paid
FIDELITY MUNICIPAL MONEY MARKET, FTXX, 316048107								
01/31/14						0.57		0.13
02/28/14						0.14		0.03
03/31/14						0.15		0.04
04/30/14						0.14		0.04
05/30/14						0.14		0.04
08/30/14						0.14		0.04
07/31/14						0.14		0.04
08/29/14						0.14		0.04
09/30/14						2.20		0.64
10/31/14						3.22		0.87
11/28/14						3.12		0.81
12/31/14						3.24		0.85
Subtotals						13.34		3.57

FIDELITY STRATEGIC INCOME, FSICX, 31638R303

01/31/14	279.53	279.53
02/28/14	250.72	250.72
03/31/14	280.62	280.62
04/30/14	267.25	267.25
05/30/14	279.90	279.90
06/30/14	267.11	267.11
07/01/14	9.01	9.01
Subtotals	1,634.14	1,634.14

Important Tax Return Document Enclosed.