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

2014

Open to Public Inspection

For calendar year 2014, or tax year beginning 3/01, 2014, and ending 2/28, 2015

Humane Society of the Commonwealth of MA  
51 Grove Street, Suite A  
Chestnut Hill, MA 02467

G Check all that apply:  Initial return  Initial return of a former public charity  
 Final return  Amended return  
 Address change  Name change

H Check type of organization:  Section 501(c)(3) exempt private foundation  
 Section 4947(a)(1) nonexempt charitable trust  Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, column (c), line 16) **\$ 5,686,571.** J Accounting method:  Cash  Accrual  
 Other (specify) *(Part I, column (d) must be on cash basis.)*

<b>Part II Analysis of Revenue and Expenses</b> <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)</i>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
R E V E N U E	1 Contributions, gifts, grants, etc, received (attach schedule) . . .	100.			
	2 Ck <input checked="" type="checkbox"/> if the foundn is not required to attach Sch B				
	3 Interest on savings and temporary cash investments . . .	46.	46.	N/A	
	4 Dividends and interest from securities . . . . .	124,822.	124,822.		
	5 a Gross rents . . . . .				
	b Net rental income or (loss) . . . . .				
	6 a Net gain or (loss) from sale of assets not on line 10 . . . . .	241,512.			
	b Gross sales price for all assets on line 6a . . . . .	1,125,591.			
	7 Capital gain net income (from Part IV, line 2) . . . . .		241,512.		
	8 Net short-term capital gain . . . . .				
	9 Income modifications . . . . .				
	10 a Gross sales less returns and allowances . . . . .				
b Less Cost of goods sold . . . . .					
c Gross profit or (loss) (attach schedule) . . . . .					
11 Other income (attach schedule) . . . . .					
12 Total. Add lines 1 through 11 . . . . .	366,480.	366,380.			
A D M I N I S T R A T I V E O P E R A T I N G A N D E X P E N S E S	13 Compensation of officers, directors, trustees, etc . . . . .	0.			
	14 Other employee salaries and wages . . . . .	35,601.		35,601.	
	15 Pension plans, employee benefits . . . . .	12,244.		12,244.	
	16 a Legal fees (attach schedule) . . . . .				
	b Accounting fees (attach sch) . . . . . See St. 17	3,690.	1,845.		1,845.
	c Other prof fees (attach sch) . . . . . See St. 22	28,610.	28,610.		
	17 Interest . . . . .				
	18 Taxes (attach schedule) . . . . . See Stm. 3	12,386.			
	19 Depreciation (attach sch) and depletion . . . . .				
	20 Occupancy . . . . .				
	21 Travel, conferences, and meetings . . . . .				
	22 Printing and publications . . . . .				
	23 Other expenses (attach schedule) . . . . .				
See Statement 4	7,729.			7,729.	
24 Total operating and administrative expenses. Add lines 13 through 23 . . . . .	100,260.	30,455.		57,419.	
25 Contributions, gifts, grants paid . . . . .	218,000.			218,000.	
26 Total expenses and disbursements. Add lines 24 and 25 . . . . .	318,260.	30,455.		275,419.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements . . . . .	48,220.				
b Net investment income (if negative, enter -0-) . . . . .		335,925.			
c Adjusted net income (if negative, enter -0-) . . . . .					

Part III	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		23,787.	33,388.	33,388.
	2 Savings and temporary cash investments		291,720.	248,198.	248,198.
	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 sch)				
	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)		87,134.		
	b Investments – corporate stock (attach schedule) Statement 5		3,272,149.	3,466,722.	5,051,659.
	c Investments – corporate bonds (attach schedule) Statement 6		366,197.	340,899.	353,326.
	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)		4,040,987.	4,089,207.	5,686,571.
LIABILITIES	17 Accounts payable and accrued expenses				
	18 Grants payable				
	19 Deferred revenue				
	20 Loans from officers, directors, trustees, & other disqualified persons				
	21 Mortgages and other notes payable (attach schedule)				
	22 Other liabilities (describe)				
	23 Total liabilities (add lines 17 through 22)		0.	0.	
	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.				
	24 Unrestricted				
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.				
	27 Capital stock, trust principal, or current funds				
	28 Paid-in or capital surplus, or land, bldg, and equipment fund				
	29 Retained earnings, accumulated income, endowment, or other funds		4,040,987.	4,089,207.	
	30 Total net assets or fund balances (see instructions)		4,040,987.	4,089,207.	
	31 Total liabilities and net assets/fund balances (see instructions)		4,040,987.	4,089,207.	

## 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	4,040,987.
2 Enter amount from Part I, line 27a	2	48,220.
3 Other increases not included in line 2 (itemize)	3	
4 Add lines 1, 2, and 3	4	4,089,207.
5 Decreases not included in line 2 (itemize)	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	4,089,207.

**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 shares MLC Company)			(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1 a Publicly - traded securities			P	Various	Various
b Capital gain distributions			P	Various	Various
c Securities litigation income			P	Various	Various
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 1,106,539.		884,079.	222,460.		
b 15,166.			15,166.		
c 3,886.			3,886.		
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69					
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	(l) Gains (Column (h)) gain minus column (k), but not less than -0- or Losses (from column (h))		
a			222,460.		
b			15,166.		
c			3,886.		
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	241,512.	
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	0.	

**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 (column (b) divided by column (c))
2013	220,417.	5,104,170.	0.043184
2012	187,275.	4,595,742.	0.040750
2011	135,808.	4,420,629.	0.030721
2010	166,475.	4,254,434.	0.039130
2009	355,238.	4,143,750.	0.085729
2 Total of line 1, column (d).....			2 0.239514
3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years .....			3 0.047903
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5 .....			4 5,558,975.
5 Multiply line 4 by line 3 .....			5 266,292.
6 Enter 1% of net investment income (1% of Part I, line 27b) .....			6 3,359.
7 Add lines 5 and 6 .....			7 269,651.
8 Enter qualifying distributions from Part XII, line 4 .....			8 275,419.

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

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

1 a 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 instrs)	
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b. . . . .	1 3,359.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (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 3,359.
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 3,359.
6 Credits/Payments:	
a 2014 estimated tax pmts and 2013 overpayment credited to 2014 . . . . .	6 a 7,600.
b Exempt foreign organizations – tax withheld at source . . . . .	6 b
c Tax paid with application for extension of time to file (Form 8868) . . . . .	6 c
d Backup withholding erroneously withheld. . . . .	6 d
7 Total credits and payments. Add lines 6a through 6d. . . . .	7 7,600.
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 0.
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid . . . . .	10 4,241.
11 Enter the amount of line 10 to be: Credited to 2015 estimated tax . . . . . ► 4,241. Refunded . . . . .	11 0.

**Part VIIA Statements Regarding Activities**

	Yes	No
1 a 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? . . . . .	1 a	X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? . . . . .	1 b	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.		
c Did the foundation file Form 1120-POL for this year? . . . . .	1 c	X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation . . . ► \$ 0. (2) On foundation managers . . . ► \$ 0.	1 d	
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. . . . ► \$ 0.	1 e	
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . . If 'Yes,' attach a detailed description of the activities.	2	X
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? If 'Yes,' attach a conformed copy of the changes . . . . .	3	X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year? . . . . . b If 'Yes,' has it filed a tax return on Form 990-T for this year? . . . . .	4 a	X
4 b	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If 'Yes,' attach the statement required by General Instruction T.	5	X
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	X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV	7	X
8 a Enter the states to which the foundation reports or with which it is registered (see instructions) . . . . . MA	8 a	
b If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If 'No,' attach explanation . . . . .	8 b	X
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? If 'Yes,' complete Part XIV	9	X
10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses . . . . .	10	X

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Form 990-PF (2014)

**Part VII: A Statements Regarding Activities (continued)**

11		X
12	X	
13	X	
Website address ► <a href="http://www.masslifesavingawards.com">www.masslifesavingawards.com</a>		
14	The books are in care of ► <u>Charles E. Clapp III</u> Telephone no ► <u>617-357-9110</u> Located at ► <u>c/o HCM, 75 Federal St., Ste. 1100 Boston MA ZIP + 4 ► 02110</u>	
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here N/A ► <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year. ► <b>15</b> N/A	
16	Yes	No
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 ► <input type="checkbox"/>		

**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.		
1 a	During the year did the foundation (either directly or indirectly):	Yes No
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? .	<input type="checkbox"/> Yes <input checked="" 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 checked="" type="checkbox"/> No
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? .	<input type="checkbox"/> Yes <input checked="" 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 checked="" 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 checked="" 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)? .	1 b 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? .	1 c 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)): .	
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 checked="" type="checkbox"/> No
If 'Yes,' list the years ► <u>20 __ , 20 __ , 20 __ , 20 __</u>		
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.) .	2 b 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. ► <u>20 __ , 20 __ , 20 __ , 20 __</u>	
3 a	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 checked="" 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.) .	3 b N/A
4 a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? .	4 a X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014? .	4 b X

**Part VII: B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?  Yes  No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?  Yes  No

(3) Provide a grant to an individual for travel, study, or other similar purposes?  Yes  No

(4) Provide a grant to an organization other than a charitable, etc, organization described in section 4945(d)(4)(A)? (see instructions).  Yes  No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?  Yes  No

b If any answer is 'Yes' to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

Organizations relying on a current notice regarding disaster assistance check here c If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?  Yes  No

If 'Yes,' attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

 Yes  No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

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  Nob If 'Yes,' did the foundation receive any proceeds or have any net income attributable to the transaction?  Yes  No

5b N/A

6b X

N/A 7b

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement 8		0.	0.	0.
-----				
-----				
-----				
-----				
-----				
-----				
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**2 Compensation of five highest-paid employees (other than those included on line 1 – see instructions). If none, enter 'NONE.'**

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
None				
-----				
-----				
-----				
-----				
-----				
-----				
-----				
-----				

Total number of other employees paid over \$50,000  0

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

**3 Five highest-paid independent contractors for professional services (see instructions). If none, enter 'NONE.'**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
None		

**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
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	<u>N/A</u>
2	

All other program-related investments. See instructions.

3 \_\_\_\_\_  
\_\_\_\_\_

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**Form 990-PF (2014)**

**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	5,225,807.
b	Average of monthly cash balances	1b	417,822.
c	Fair market value of all other assets (see instructions)	1c	
d	<b>Total</b> (add lines 1a, b, and c)	1d	5,643,629.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	5,643,629.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	84,654.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,558,975.
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	277,949.

**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	277,949.
2a	Tax on investment income for 2014 from Part VI, line 5	2a	3,359.
b	Income tax for 2014. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	3,359.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	274,590.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4.	5	274,590.
6	Deduction from distributable amount (see instructions)	6	
7	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	274,590.

**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	275,419.
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	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	275,419.
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	3,359.
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	272,060.

**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 . . . . .				274,590.
2 Undistributed income, if any, as of the end of 2014:				
a Enter amount for 2013 only . . . . .			247,944.	
b Total for prior years: 20 ____, 20 ____, 20 ____		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: ► \$ 275,419.			247,944.	
a Applied to 2013, but not more than line 2a . . . . .				
b Applied to undistributed income of prior years (Election required – see instructions) . . . . .		0.		
c Treated as distributions out of corpus (Election required – see instructions) . . . . .	0.			
d Applied to 2014 distributable amount . . . . .				27,475.
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 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 . . . . .				247,115.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required – see instructions)	0.			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions)	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 . . . . .				
e Excess from 2014 . . . . .				

BAA

Form 990-PF (2014)

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

N/A

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

**Part 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).)

None

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

None

**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:

**See Statement 9**

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

**See Statement for Line 2a**

c Any submission deadlines:

**See Statement for Line 2a**

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

**See Statement for Line 2a**

**Part XVII** 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
<i>a Paid during the year</i> See Statement 10				
<b>Total</b>			► 3a	218,000.
<i>b Approved for future payment</i>				
<b>Total</b>			► 3b	

## Part XVI A Analysis of Income-Producing Activities

	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	46.	
4 Dividends and interest from securities			14	124,822.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
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			18	241,512.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)				366,380.	
13 Total. Add line 12, columns (b), (d), and (e)				13	366,380.
(See worksheet in line 13 instructions to verify calculations.)					

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)
N/A	

**Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations**

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	.....	.....	.....	.....	.....	.....
(2) Other assets	.....	.....	.....	.....	.....	.....

**b Other transactions:**

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

c Sharing of facilities, equipment, mailing lists, other assets, or paid employees...

	Yes	No
1 a (1)		X
1 a (2)		X
1 b (1)		X
1 b (2)		X
1 b (3)		X
1 b (4)		X
1 b (5)		X
1 b (6)		X
1 c		X

**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.

<b>(a) Line no.</b>	<b>(b) Amount involved</b>	<b>(c) Name of noncharitable exempt organization</b>	<b>(d) Description of transfers, transactions, and sharing arrangements</b>
N/A			

**2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? .....

Yes  No

**b** If 'Yes,' complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

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

Sign  
Here

John H. Martin

6/30/15

Da

Title

May the IRS discuss  
this return with the  
preparer shown below  
(see instructions)?

Signature of filer or trustee		Date	File No.	Yes	No
<b>Paid Preparer Use Only</b>	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	Amanda Adams	<i>Amanda Adams</i>	6/24/15		P00748038
	Firm's name ► Blazek & Vetterling	Firm's EIN ► 76-0269860			
Firm's address ► 2900 Weslayan, Suite 200	Phone no (713) 439-5739				
Houston, TX 77027-5132					

**BAA**

**Form 990-PF (2014)**

Humane Society of the Commonwealth of MA

04-2104291

**Statement 1**  
**Form 990-PF, Part I, Line 16b**  
**Accounting Fees**

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Return prep and tax compliance	\$ 3,690.	\$ 1,845.		\$ 1,845.
Total	<u>\$ 3,690.</u>	<u>\$ 1,845.</u>	<u>=====</u>	<u>\$ 1,845.</u>

**Statement 2**  
**Form 990-PF, Part I, Line 16c**  
**Other Professional Fees**

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Investment fees ....	\$ 28,610.	\$ 28,610.		
Total	<u>\$ 28,610.</u>	<u>\$ 28,610.</u>	<u>=====</u>	<u>\$ 0.</u>

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

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Excise tax .....	\$ 12,386.	\$ 0.		
Total	<u>\$ 12,386.</u>	<u>\$ 0.</u>	<u>=====</u>	<u>\$ 0.</u>

**Statement 4**  
**Form 990-PF, Part I, Line 23**  
**Other Expenses**

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Background checks .....	\$ 573.			\$ 573.
Bank fees .....	64.			64.
Insurance .....	726.			726.
Medals and certificates .....	652.			652.
News Clippings .....	1,322.			1,322.
Office expense .....	1,667.			1,667.
Payroll processing fees .....	1,552.			1,552.
State filing fee .....	70.			70.
Telephone expense .....	1,103.			1,103.
Total	<u>\$ 7,729.</u>	<u>\$ 0.</u>	<u>=====</u>	<u>\$ 7,729.</u>

**Statement 5**  
**Form 990-PF, Part II, Line 10b**  
**Investments - Corporate Stocks**

<u>Corporate Stocks</u>	<u>Valuation Method</u>	<u>Book Value</u>	<u>Fair Market Value</u>
HCM Equities - See attached pgs 1-3	Cost	\$ 2,463,393.	\$ 4,019,906.
HCM International - See attached pgs 3-4	Cost	744,057.	790,733.
PIMCO Dynamic Credit Income Fund	Cost	197,217.	185,400.
4,500 shs Central Fund Canada	Cost	62,055.	55,620.
	Total	<u>\$ 3,466,722.</u>	<u>\$ 5,051,659.</u>

**Statement 6**  
**Form 990-PF, Part II, Line 10c**  
**Investments - Corporate Bonds**

<u>Corporate Bonds</u>	<u>Valuation Method</u>	<u>Book Value</u>	<u>Fair Market Value</u>
Oracle Corp 5.25% 1/15/16	Cost	\$ 24,949.	\$ 26,052.
Amerigas Partners 6.25% 8/20/19	Cost	59,839.	62,700.
Frontier Comm. Corp 7.625% 4/15/24	Cost	54,009.	53,625.
Ford Motor Credit Co 5.75% 02/01/21	Cost	50,225.	58,391.
Windstream Corp. Cont. 7.75% 10/1/21	Cost	51,820.	50,656.
Goldman Sachs Group 4.00% 11/11/28	Cost	50,001.	49,477.
Hershey Company 12/13/10 4.125% 12/01/20	Cost	25,163.	27,236.
JP Morgan Chase & Co 5.25% 5/01/15	Cost	24,893.	25,189.
	Total	<u>\$ 340,899.</u>	<u>\$ 353,326.</u>

**Statement 7**  
**Form 990-PF, Part VII-A, Line 12**  
**Explanation of Distribution to Donor Advised Fund**

During this tax year, the Foundation treated a distribution to Schwab Charitable Endowment, a donor advised fund over which the Foundation had advisory privileges, as a qualifying distribution. Donor advised funds are exempt under Internal Revenue Code Section 501(c)(3), must be organized and operated exclusively for one or more of the charitable purposes described in Section 170(c)(2)(B), and have sole discretion over the funds distributed to them. The Foundation has made, and continues to regularly make, recommendations for grants to be made by the donor advised fund to public charities for charitable purposes similar to the grants made directly by the Foundation.

**Statement 8**  
**Form 990-PF, Part VIII, Line 1**  
**List of Officers, Directors, Trustees, and Key Employees**

<u>Name and Address</u>	<u>Title and Average Hours Per Week Devoted</u>	<u>Compen-sation</u>	<u>Contri-bution to EBP &amp; DC</u>	<u>Expense Account/Other</u>
Lawrence T. Perera 51 Grove Street, Ste. A Chestnut Hill, MA 02467	Pres/Trustee 1.00	\$ 0.	\$ 0.	\$ 0.
Ferdinand Colloredo-Mansfeld 51 Grove Street, Ste. A Chestnut Hill, MA 02467	1st VP/Trustee 1.00	0.	0.	0.
David T. Lawrence 51 Grove Street, Ste. A Chestnut Hill, MA 02467	2nd VP/Rec Sec 1.00	0.	0.	0.
Ian H. Gardiner 51 Grove Street, Ste. A Chestnut Hill, MA 02467	Treas/Trustee 1.00	0.	0.	0.
W. Nicholas Thorndike 51 Grove Street, Ste. A Chestnut Hill, MA 02467	Corr Sec/Trstee 1.00	0.	0.	0.
Henry P. Becton, Jr. 51 Grove Street, Ste. A Chestnut Hill, MA 02467	Trustee 1.00	0.	0.	0.
H. D. S. Greenway 51 Grove Street, Ste. A Chestnut Hill, MA 02467	Trustee 1.00	0.	0.	0.
Edward P. Lawrence 51 Grove Street, Ste. A Chestnut Hill, MA 02467	Trustee 1.00	0.	0.	0.
George Lewis 51 Grove Street, Ste. A Chestnut Hill, MA 02467	Trustee 1.00	0.	0.	0.
Frederick S. Moseley III 51 Grove Street, Ste. A Chestnut Hill, MA 02467	Honorary Trustee 1.00	0.	0.	0.
G. West Saltonstall 51 Grove Street, Ste. A Chestnut Hill, MA 02467	Trustee 1.00	0.	0.	0.
Ross E. Sherbrooke 51 Grove Street, Ste. A Chestnut Hill, MA 02467	Trustee 1.00	0.	0.	0.
<b>Total</b>		<b>\$ 0.</b>	<b>\$ 0.</b>	<b>\$ 0.</b>

**Statement 9**  
**Form 990-PF, Part XV, Line 2a-d**  
**Application Submission Information**

Name of Grant Program: Water Accident, Injury, and Death Prev.  
 Name: Beth Nilsson  
 Care Of: Humane Soc. of the Commonwealth of MA  
 Street Address: 51 Grove Street, Suite A  
 City, State, Zip Code: Chestnut Hill, MA 02467  
 Telephone: 617-232-6242  
 E-Mail Address: None  
 Form and Content: See [www.masslifesavingawards.com](http://www.masslifesavingawards.com) or call for more information.  
 Submission Deadlines: None  
 Restrictions on Awards: See [www.masslifesavingawards.com](http://www.masslifesavingawards.com) or call for more information.

**Statement 10**  
**Form 990-PF, Part XV, Line 3a**  
**Recipient Paid During the Year**

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
Awards to individuals See attachment	None	I	To recognize the efforts of individuals who voluntarily attempt to save lives.	\$ 40,000.
Schwab Charitable Fund 101 Montgomery St San Francisco, CA 94104	N/A	PC	General Support	50,000.
Thompson Island Outward Bound P.O. Box 127 Boston, MA 02127	N/A	PC	General Support	30,000.
Samaritans, Inc. 41 West St Fl 4 Boston, MA 02111	N/A	PC	24/7 On-call service	10,000.
Thacher Island Association P.O. Box 73 Rockport, MA 01966	N/A	PC	Restoration project of Keeper's House	10,000.
Scituate Historical Society P.O. Box 276 Scituate, MA 02066	N/A	PC	Grant to update lifesaving exhibits in Maritime and Irish Mossing Museum	18,000.

Humane Society of the Commonwealth of MA

04-2104291

**Statement 10 (continued)**  
**Form 990-PF, Part XV, Line 3a**  
**Recipient Paid During the Year**

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Boston Med Flight Robin St Hanger 1727 Bedford, MA 01730	N/A	SO I	Grant for safety equipment	\$ 60,000.
Total				<u>\$ 218,000.</u>

**Humane Society of the Commonwealth of MA**  
**2014 Form 990-PF**

**04-2104291**

**Humane Society of the Commonwealth of Massachusetts** **Investment Holdings On: 02/28/2015**

<b>Ticker</b>	<b>Shares</b>	<b>Total Cost</b>	<b>Price</b>	<b>Market Value</b>	<b>% MV</b>	<b>Est. Annual Income</b>	<b>Current Yield</b>
---------------	---------------	-------------------	--------------	---------------------	-------------	---------------------------	----------------------

<b>Equity</b>							
<b>Stock - Common</b>							
<b>Basic Materials</b>							
Du Pont E I De Nemours	DD	1,450 00	\$68,128 25	\$77 85	\$112,882 50	1 99%	\$2,842 00
Goldcorp Inc	GG	2,400 00	\$66,392 93	\$21 98	\$52,752 00	0 94%	\$1,440 00
	<b>Basic Materials Total</b>	<b>3,850 00</b>	<b>\$134,521 18</b>		<b>\$165,634 50</b>	<b>2 93%</b>	<b>\$4,282 00</b>
<b>Consumer Discretionary</b>							
Carmax Incorporated	KMX	2,150 00	\$47,291 21	\$67 11	\$144,286 50	2 55%	\$0 00
Yum! Brands, Inc	YUM	1,500 00	\$108,290 42	\$81 11	\$121,665 00	2 15%	\$2,460 00
	<b>Consumer Discretionary Total</b>	<b>3,650 00</b>	<b>\$155,581 63</b>		<b>\$265,951 50</b>	<b>4 70%</b>	<b>\$2,460 00</b>
<b>Consumer Staples</b>							
CVS/Caremark Corporation	CVS	2,050 00	\$86,012 00	\$103 87	\$212,933 50	3 77%	\$2,870 00
Procter & Gamble Co	PG	1,850 00	\$144,574 50	\$85 13	\$157,490 50	2 79%	\$4,905 46
Walgreens Boots Alliance Inc Com	WBA	2,800 00	\$146,197 42	\$83 08	\$232,624 00	4 12%	\$3,780 00
	<b>Consumer Staples Total</b>	<b>6,700 00</b>	<b>\$376,783 92</b>		<b>\$603,048 00</b>	<b>10 68%</b>	<b>\$11,555 46</b>
<b>Energy</b>							
Core Laboratories NV	CLB	500 00	\$41,562 22	\$109 92	\$54,960 00	0 97%	\$1,100 00
Exxon Mobil Corp	XOM	1,200 00	\$42,816 72	\$88 54	\$106,248 00	1 87%	\$3,504 00
Schlumberger Limited	SLB	1,700 00	\$130,116 49	\$84 16	\$143,072 00	2 53%	\$3,400 00
	<b>Energy Total</b>	<b>3,400 00</b>	<b>\$214,495 43</b>		<b>\$304,280 00</b>	<b>5 37%</b>	<b>\$8,004 00</b>
<b>Financials</b>							
Ace Limited	ACE	900 00	\$45,926 99	\$114 01	\$102,609 00	1 82%	\$2,340 00
Bank of Nova Scotia	BNS	1,250 00	\$68,136 73	\$53 45	\$66,812 50	1 19%	\$2,725 00
CBRE Group Inc	CBG	2,900 00	\$68,492 36	\$34 26	\$99,354 00	1 76%	\$0 00

Humane Society of the Commonwealth of MA  
2014 Form 990-PF

04-2104291

Humane Society of the Commonwealth of Massachusetts				Investment Holdings On: 02/28/2015				
	<u>Ticker</u>	<u>Shares</u>	<u>Total Cost</u>	<u>Price</u>	<u>Market Value</u>	<u>% MV</u>	<u>Est. Annual Income</u>	<u>Current Yield</u>
<b>Equity</b>								
<b>Stock - Common</b>								
<b>Financials</b>								
Wells Fargo & Company	WFC	2,350 00	\$78,620 36	\$54.79	\$128,756 50	2 28%	\$3,525 00	2 74%
	<b>Financials Total</b>	<b>7,400 00</b>	<b>\$261,176 44</b>		<b>\$397,532 00</b>	<b>7 05%</b>	<b>\$8,590 00</b>	<b>2 16%</b>
<b>Health Care</b>								
Gilead Sciences Inc	GILD	1,800 00	\$39,656 70	\$103.53	\$186,354 00	3 29%	\$0 00	0 00%
Idexx Laboratories Inc	IDXX	450 00	\$48,652 53	\$156.83	\$70,573 50	1 25%	\$0 00	0 00%
Johnson & Johnson	JNJ	720 00	\$20,391 57	\$102.51	\$73,807 20	1 31%	\$2,160 00	2 93%
Medtronic PLC	MDT	900 00	\$39,889 35	\$77.59	\$69,831 00	1 24%	\$1,098 00	1 57%
Thermo Fisher Scientific Inc	TMO	1,000 00	\$33,753 51	\$130.00	\$130,000 00	2 30%	\$600 00	0 46%
	<b>Health Care Total</b>	<b>4,870 00</b>	<b>\$182,343 66</b>		<b>\$530,565 70</b>	<b>9 39%</b>	<b>\$3,858 00</b>	<b>0 73%</b>
<b>Industrials</b>								
3M Company	MMM	500 00	\$39,040 04	\$168.65	\$84,325 00	1 49%	\$2,050 00	2 43%
Danaher Corporation	DHR	2,200 00	\$87,237 93	\$87.28	\$192,016 00	3 39%	\$1,188 00	0 62%
United Parcel Service Inc Cl B	UPS	850 00	\$55,633 40	\$101.73	\$86,470 50	1 53%	\$2,482 00	2 87%
	<b>Industrials Total</b>	<b>3,550 00</b>	<b>\$181,911 37</b>		<b>\$362,811 50</b>	<b>6 41%</b>	<b>\$5,720 00</b>	<b>1 58%</b>
<b>Information Technology</b>								
Akamai Technologies Inc	AKAM	1,350 00	\$34,723 89	\$69.51	\$93,838 50	1 66%	\$0 00	0 00%
Amphenol Corp Cl A	APH	2,000 00	\$39,616 10	\$56.46	\$112,920 00	2 00%	\$1,000 00	0 89%
Microsoft Corp	MSFT	3,200 00	\$89,267 58	\$43.85	\$140,320 00	2 48%	\$3,968 00	2 83%
Paychex Incorporated	PAYX	3,000 00	\$116,641 60	\$49.84	\$149,505 00	2 64%	\$4,560 00	3 05%
Qualcomm Inc	QCOM	1,000 00	\$61,673 92	\$72.51	\$72,510 00	1 29%	\$1,920 00	2 65%
Solera Holdings Inc	SLH	2,400 00	\$108,067 74	\$55.74	\$133,776 00	2 37%	\$1,872 00	1 40%
Visa Corporation	V	600 00	\$108,815 17	\$271.31	\$162,786 00	2 88%	\$288 00	0 18%
	<b>Information Technology Total</b>	<b>13,550 00</b>	<b>\$558,806 00</b>		<b>\$865,655 50</b>	<b>15 32%</b>	<b>\$13,608 00</b>	<b>1 57%</b>
<b>Utilities</b>								
Portland General Electric Co	POR	2,500 00	\$68,342 24	\$37.29	\$93,225 00	1 65%	\$2,800 00	3 00%
UGI Corporation	UGI	4,200 00	\$80,297 50	\$33.99	\$142,758 00	2 52%	\$3,822 00	2 68%
	<b>Utilities Total</b>	<b>6,700 00</b>	<b>\$148,639 74</b>		<b>\$235,983 00</b>	<b>4 17%</b>	<b>\$6,622 00</b>	<b>2 81%</b>
	<b>Stock - Common Total</b>	<b>53,670 00</b>	<b>\$2,214,259 37</b>		<b>\$3,731,461 70</b>	<b>66 02%</b>	<b>\$64,699 46</b>	<b>1 73%</b>

**Humane Society of the Commonwealth of Massachusetts** **Investment Holdings On: 02/28/2015**

	<u>Ticker</u>	<u>Shares</u>	<u>Total Cost</u>	<u>Price</u>	<u>Market Value</u>	<u>% MV</u>	<u>Est. Annual Income</u>	<u>Current Yield</u>
<b>Equity</b>								
<b>Stock - REIT</b>								
Amencan Tower Corp	AMT	1,414 00	\$117,117 21	\$99 14	\$140,183 96	2 49%	\$2,375 52	1 69%
HCP Incorporated	HCP	3,500 00	\$132,016 08	\$42 36	\$148,260 00	2 61%	\$7,910 00	5 34%
	<b>Total</b>	<b>4,914 00</b>	<b>\$249,133 29</b>		<b>\$288,443 96</b>	<b>5 10%</b>	<b>\$10,285 52</b>	<b>3 57%</b>
	<b>Equity Total</b>	<b>58,584 00</b>	<b>\$2,463,392 66</b>		<b>\$4,019,905 66</b>	<b>71 12%</b>	<b>\$74,984 98</b>	<b>1 67%</b>

**International**

**Mutual Funds (ETF/CEF) - International Equity**

EGShares Emerging Markets Consumer ETF	ECON	4,000 00	\$101,905 84	\$26 48	\$105,920 00	1 88%	\$1,212 41	1 14%
Vanguard Emerging Markets Fund	VWO	2,500 00	\$104,698 45	\$41 80	\$104,500 00	1 85%	\$2,772 50	2 65%
Wisdomtree Int'l Midcap Div Fund	DIM	1,150 00	\$55,744 25	\$59 73	\$68,689 50	1 22%	\$1,999 97	2 91%
	<b>Total</b>	<b>7,650 00</b>	<b>\$262,348 54</b>		<b>\$279,109 50</b>	<b>4 95%</b>	<b>\$5,984 88</b>	<b>2 14%</b>

**Mutual Funds - International Equity**

Harbor International Fund	HAINX	1,696 13	\$111,677 05	\$69 11	\$117,219 54	2 07%	\$2,405 93	2 05%
Harding Loevner Emerging Markets Fund	HLEMX	2,403 29	\$119,613 00	\$46 85	\$112,594 23	1 99%	\$926 73	0 82%

Humane Society of the Commonwealth of Massachusetts				Investment Holdings On: 02/28/2015				
	<u>Ticker</u>	<u>Shares</u>	<u>Total Cost</u>	<u>Price</u>	<u>Market Value</u>	<u>% MV</u>	<u>Est Annual Income</u>	<u>Current Yield</u>
<b>International</b>								
<b>Mutual Funds - International Equity</b>								
UMB Scout International Fund	UMBWX	4,026 24	\$120,558 00	\$34 07	\$137,173 93	2 42%	\$2,091 63	1 52%
	Total	8,125 66	\$351,848 05		\$366,987 70	6 48%	\$5,424 29	1 48%
<b>Stock - ADR</b>								
Roche Holdings ADR	RHHBY	1,200 00	\$29,233 60	\$34 13	\$40,956 00	0 72%	\$990 96	2 42%
Vodafone Group PLC Spon ADR New	VOD	3,000 00	\$100,627.00	\$34 56	\$103,680 00	1 83%	\$5,346 30	5 16%
	Total	4,200 00	\$129,860 60		\$144,636 00	2 55%	\$6,337 26	4 38%
	International Total	19,975 66	\$744,057 19		\$790,733 20	13 98%	\$17,746 43	2 24%

**Humane Society of the Commonwealth of Massachusetts  
2014 Form 990-PF**

**04-2104291**

**Part XV, Line 3a - Grants and Contributions Paid During the Year**

<u>Name and Address</u>	<u>Amount</u>
Charles Harris 2 Tilden Road Scituate, MA 02066	\$ 3,000
Aryanna Elizabeth Lynch 53 Abbott Street Weymouth, MA 02190	3,000
Colette E. Crooks 10 Lessard Terrace Rowley, MA 01969	3,000
Mark Robert Drago 9 Kenmore Road Melrose, MA 02176	5,000
John Rose 28 Tiverton Avenue Bradford, MA 01835	5,000
Kenneth W. Baker 3584 Elliott Circle Valdosta, GA 31601	3,000
Michael F. Grant 91 Dustin Street Brighton, MA 02135	5,000
James Keating Skerry 11 Pine Knoll Road Lexington, MA 02420	5,000
Rebecca E. Macklis 61 Blake Road Brookline, MA 02445	3,000
On Sak 511 Moody Street, #14 Lowell, MA 01854	5,000
	<b>Total Awards to Individuals FY 2014-2015</b>
	<b><u>\$ 40,000</u></b>

Attachment to Part XV, Line 3a