



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



EXTENDED TO FEBRUARY 16, 2016

Return of Private Foundation

OMB No 1545-0052

Form 990-PF

Department of the Treasury
Internal Revenue Service

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

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

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

2014

Open to Public Inspection

For calendar year 2014 or tax year beginning JUL 1, 2014, and ending JUN 30, 2015

Name of foundation THE JULIA & SEYMOUR GROSS FOUNDATION, INC.		A Employer identification number 13-6122092
Number and street (or P.O. box number if mail is not delivered to street address) P.O. BOX 506	Room/suite	B Telephone number 781-237-2544
City or town, state or province, country, and ZIP or foreign postal code WESTON, MA 02493-0003		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <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"/>
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		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 6,121,032. (Part I, column (d) must be on cash basis)	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		119.	119.		STATEMENT 1
4 Dividends and interest from securities		113,783.	113,783.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		100,713.			
b Gross sales price for all assets on line 6a 1,992,517.					
7 Capital gain net income (from Part IV, line 2)			100,713.		
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)					
11 Other income					
12 Total. Add lines 1 through 11		214,615.	214,615.		
13 Compensation of officers, directors, trustees, etc		44,370.	11,092.		33,278.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 3		18,776.	0.		18,776.
c Other professional fees STMT 4		31,171.	31,171.		0.
17 Interest					
18 Taxes					
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings		744.	0.		744.
22 Printing and publications					
23 Other expenses STMT 5		5,098.	0.		5,098.
24 Total operating and administrative expenses. Add lines 13 through 23		100,159.	42,263.		57,896.
25 Contributions, gifts, grants paid		128,574.			128,574.
26 Total expenses and disbursements. Add lines 24 and 25		228,733.	42,263.		186,470.
27 Subtract line 26 from line 12		<14,118.>			
a Excess of revenue over expenses and disbursements			172,352.		
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)				N/A	

423501 11-24-14 LHA For Paperwork Reduction Act Notice, see instructions.

Form 990-PF (2014) 8

**THE JULIA & SEYMOUR GROSS
FOUNDATION, INC.**

Part II Balance Sheets <small>Attached schedules and amounts in the description column should be for end-of-year amounts only</small>		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	1,783,442.	343,694.	343,694.
	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			
	7 Other notes and loans receivable ▶ 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 STMT 6	31,611.	1,527,029.	1,530,582.
	b Investments - corporate stock STMT 7	2,834,489.	2,764,701.	4,246,756.
	c Investments - corporate bonds			
	11 Investments - land, buildings and equipment basis ▶ Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment basis ▶ Less accumulated depreciation ▶			
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)	4,649,542.	4,635,424.	6,121,032.	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	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 checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31			
	24 Unrestricted	4,649,542.	4,635,424.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input 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			
	30 Total net assets or fund balances	4,649,542.	4,635,424.	
31 Total liabilities and net assets/fund balances	4,649,542.	4,635,424.		

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	4,649,542.
2 Enter amount from Part I, line 27a	2	<14,118.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	4,635,424.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	4,635,424.

(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 SALE OF PUBLICLY TRADED SECURITIES

P

VARIOUS

VARIOUS

b

c

d

e

(e) Gross sales price

(f) Depreciation allowed
(or allowable)

(g) Cost or other basis
plus expense of sale

(h) Gain or (loss)
(e) plus (f) minus (g)

a 1,992,517.

1,891,804.

100,713.

b

c

d

e

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

(i) FMV 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

b

c

d

e

100,713.

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

100,713.

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)

If (loss), enter -0- in Part I, line 8

3

N/A

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

424,742.

6,083,491.

.069819

2012

303,314.

5,610,606.

.054061

2011

408,953.

5,350,827.

.076428

2010

227,552.

5,249,652.

.043346

2009

207,639.

4,862,913.

.042698

2 Total of line 1, column (d)

2

.286352

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

.057270

4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5

4

6,220,261.

5 Multiply line 4 by line 3

5

356,234.

6 Enter 1% of net investment income (1% of Part I, line 27b)

6

1,724.

7 Add lines 5 and 6

7

357,958.

8 Enter qualifying distributions from Part XII, line 4

8

186,470.

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.

423521 11-24-14

3

Form 990-PF (2014)

14110128 756359 622260.0

2014.05050 THE JULIA & SEYMOUR GROSS F 62226001

THE JULIA & SEYMOUR GROSS
FOUNDATION, INC.

Form 990-PF (2014)

13-6122092 Page 4

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	3,447.
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	3,447.
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	3,447.
6	Credits/Payments		
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a	7,613.
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	7,613.
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	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	4,166.
11	Enter the amount of line 10 to be Credited to 2015 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11	0.

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?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? 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		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0.		
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		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		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		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?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> <u>NY</u>		
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	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		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

Form 990-PF (2014)

THE JULIA & SEYMOUR GROSS
FOUNDATION, INC.

Form 990-PF (2014)

13-6122092

Page 5

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► JANE ROGERS CLARK, MD Located at ► P.O. BOX 506, WESTON, MA	Telephone no ► 781-237-2544 ZIP+4 ► 02493-0003		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A			
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? 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 ►	16	Yes	No X

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 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 checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" 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 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)? Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>	1b	X
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	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? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions) N/A	2b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ►		
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 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) N/A	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	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?	4b	X

Form 990-PF (2014)

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

☐

5b

X

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?

SEE STATEMENT 9

☒ 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.

6b

X

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

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.

(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		44,370.	0.	0.

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

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

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

☐ 0

Form 990-PF (2014)

THE JULIA & SEYMOUR GROSS
FOUNDATION, INC.

Form 990-PF (2014)

13-6122092

Page 7

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

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

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

Total number of others receiving over \$50,000 for professional services

0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

	Amount
1 N/A	
2	
All other program-related investments See instructions	
3	

Total. Add lines 1 through 3

0.

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	5,421,472.
b	Average of monthly cash balances	1b	893,514.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	6,314,986.
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	6,314,986.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	94,725.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	6,220,261.
6	Minimum investment return. Enter 5% of line 5	6	311,013.

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	311,013.
2a	Tax on investment income for 2014 from Part VI, line 5	2a	3,447.
b	Income tax for 2014 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	3,447.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	307,566.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	307,566.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	307,566.

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	186,470.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	186,470.
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	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	186,470.

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Form 990-PF (2014)

THE JULIA & SEYMOUR GROSS
FOUNDATION, INC.

Form 990-PF (2014)

13-6122092 Page 9

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				307,566.
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2014				
a From 2009				
b From 2010				
c From 2011	144,832.			
d From 2012	30,268.			
e From 2013	124,841.			
f Total of lines 3a through e	299,941.			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 186,470.				
a Applied to 2013, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2014 distributable amount				186,470.
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).)	121,096.			121,096.
6 Enter the net total of each column as indicated below.				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	178,845.			
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 instr			0.	
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	178,845.			
10 Analysis of line 9				
a Excess from 2010				
b Excess from 2011	23,736.			
c Excess from 2012	30,268.			
d Excess from 2013	124,841.			
e Excess from 2014				

423581
11-24-14

Form 990-PF (2014)

THE JULIA & SEYMOUR GROSS
FOUNDATION, INC.**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 Paid during the year				
SEE ATTACHMENT B	N/A			128,574.
Total			3a	128,574.
b Approved for future payment				
NONE				
Total			3b	0.

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

[illegible]

☐ Yes ☒ No

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

☒ Yes ☐ No

Phone no (212) 286-2600

2014.05050 THE JULIA & SEYMOUR GROSS F 62226001

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
INTEREST INCOME - CHECKING	35.	35.	
INTEREST INCOME - MONEY MARKET FUND	84.	84.	
TOTAL TO PART I, LINE 3	119.	119.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
DIVIDENDS AND INTEREST FROM SECURITIES	113,783.	0.	113,783.	113,783.	
TO PART I, LINE 4	113,783.	0.	113,783.	113,783.	

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
O'CONNOR DAVIES, LLP	18,776.	0.		18,776.
TO FORM 990-PF, PG 1, LN 16B	18,776.	0.		18,776.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	4
-------------	-------------------------	-----------	---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT ADVISORY FEES	31,171.	31,171.		0.
TO FORM 990-PF, PG 1, LN 16C	31,171.	31,171.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	5
-------------	----------------	-----------	---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DUES AND SUBSCRIPTIONS	2,549.	0.		2,549.
OFFICE EXPENSES	2,299.	0.		2,299.
FILING FEES	250.	0.		250.
TO FORM 990-PF, PG 1, LN 23	5,098.	0.		5,098.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	6
-------------	--	-----------	---

DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHMENT A		X	27,623.	30,672.
SEE ATTACHMENT A	X		1,499,406.	1,499,910.
TOTAL U.S. GOVERNMENT OBLIGATIONS			1,499,406.	1,499,910.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			27,623.	30,672.
TOTAL TO FORM 990-PF, PART II, LINE 10A			1,527,029.	1,530,582.

FORM 990-PF	CORPORATE STOCK	STATEMENT	7
-------------	-----------------	-----------	---

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHMENT A	2,764,701.	4,246,756.
TOTAL TO FORM 990-PF, PART II, LINE 10B	2,764,701.	4,246,756.

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT	8
-------------	---	-----------	---

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
JONATHAN P. GERTLER, MD P.O. BOX 506 WESTON, MA 02493-0003	SECRETARY 5.00	0.	0.	0.
JANE R. CLARK, MD P.O. BOX 506 WESTON, MA 02493-0003	PRESIDENT/EXECUTIVE DIRECTOR 25.00	44,370.	0.	0.
CLARK CHESSIN GERTLER P.O. BOX 506 WESTON, MA 02493-0003	VICE PRESIDENT 1.00	0.	0.	0.
CHARLES GARRISON GERTLER P.O. BOX 506 WESTON, MA 02493-0003	TREASURER 1.00	0.	0.	0.
ROGER D. KAMM, PHD P.O. BOX 506 WESTON, MA 02493-0003	BOARD MEMBER 0.50	0.	0.	0.
WILLIAM R. GERTLER P.O. BOX 506 WESTON, MA 02493-0003	BOARD MEMBER 0.50	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		44,370.	0.	0.

FORM 990-PF	EXPENDITURE RESPONSIBILITY STATEMENT	STATEMENT	9
	PART VII-B, LINE 5C		

GRANTEE'S NAME

WESTON AFFORDABLE HOUSING FOUNDATION

GRANTEE'S ADDRESSP.O. BOX 171
WESTON, MA 02493

<u>GRANT AMOUNT</u>	<u>DATE OF GRANT</u>	<u>AMOUNT EXPENDED</u>
1,000.	06/21/14	1,000.

PURPOSE OF GRANT

GENERAL

DATES OF REPORTS BY GRANTEE

10/20/2015

ANY DIVERSION BY GRANTEE

NONE

The Julia & Seymour Gross Foundation, Inc.
 EIN # 13-6122092
 Portfolio Value
 As of June 30, 2015

Security	Shares	Cost Basis	Market Value
Corporate Stock			
3M Company	1,500	\$ 121,568 22	\$ 231,450 00
Apple Inc	2,100	74,961	263,392 50
Bank of New York Mellon Corp	1,000 00	41,129	41,970
Berkshire Hathaway Inc Cl B	2,500 00	121,195 50	340,275 00
Chevron Corp	2,000 00	169,463 00	192,940 00
Clearbridge Energy MLP FD Inc	5,000 00	119,539 00	116,300 00
Conocophillips	1,500 00	86,481 57	92,115 00
Du Pont El De Nemours & Co	1,500 00	65,647 10	95,925 00
Ecolab, Inc.	100 00	11,367 63	11,307 00
Exxon Mobil Corp	3,000 00	207,267 15	249,600 00
General Electric Co	5,000 00	107,746 16	132,850 00
Great Plains	3,000 00	71,577 90	72,480 00
Google Inc Class A, CGMI and/or its Affiliates	75 00	21,253 34	40,503 00
Google Inc Class C, CGMI and/or its Affiliates	74 79	21,127 41	39,038 25
Intel Corp CGMI and/or its affiliates	3,000 00	69,107 80	91,245 00
International Paper Co	2,000 00	62,933 60	95,180 00
JPMorgan Chase & Co	1,000 00	64,229 00	67,760 00
Merck & Co Inc New Com	1,500 00	67,834 05	85,395 00
MetLife Incorporated	4,612 00	207,608 74	258,225 88
Microsoft Corp CGMI and/or its affiliates	3,000 00	78,659 30	132,450 00
National Grid PLC	1,000 00	43,209 00	64,570 00
Nestle S A Sponsored ADR	2,000 00	109,755 00	144,320 00
Nextera Energy Inc	2,000 00	131,773 40	196,060 00
Phillips 66 (spinoff of Conocophillips)	1,500 00	79,258 53	120,840 00
PPG Industries Inc	600 00	36,133 00	137,664 00
Procter & Gamble Co.	1,000 00	52,906 67	78,240 00
Schlumberger LTD	1,000 00	83,281 70	86,190 00
Southern Co	1,000 00	35,452 90	41,900 00
Texas Instruments	1,500 00	46,258 05	77,265 00
Travelers Companies Inc	1,000 00	49,249 62	96,660 00
UnitedHealth GP Inc	1,000 00	71,543 00	122,000 00
Wal-Mart Stores Inc	1,500 00	74,975 00	106,395 00
Walt Disney Co	2,000 00	66,078 00	228,280 00
Wells Fargo 5 85-Q FIXD-TO-FLT (WFC Q)	2,000 00	51,420 00	51,000 00
Wisconsin Energy Corp	1,000 00	42,711 00	44,970 00
		\$ 2,764,701.49	\$ 4,246,755.63
U.S. Government Obligations			
United States Treasury Bill Cusip 912796FB0	1,500,000 00	\$ 1,499,406.00	\$ 1,499,910.00
State and Municipal Obligations			
GNMA PL#003345M 5 0% Due 2/20/33		\$ 8,292 70	\$ 8,439 58
GNMA PL#003247M 5 0% Due 6/20/32		3,977 77	6,672 79
GNMA PL#003233M 5 5% Due 5/20/17		1,745 09	907 99
GNMA PL# 003259M 5 5% Due 7/20/32		4,923 57	6,016 44
GNMA PL#590122X 6% Due 5/15/32		2,357 30	4,683 87
GNMA PL#003249M 6% Due 6/20/32		3,817 57	2,935 15
GNMA PL#586596X 6 5% Due 6/15/32		2,508 74	1,016.33
		\$ 27,622.74	\$ 30,672.15
TOTAL INVESTMENTS		\$ 4,291,730.23	\$ 5,777,337.78

The Julia Seymour Gross Foundation, Inc.
Grants Paid
June 30, 2015

Grantee	Foundation Status	Purpose of Grant	Amount
Swim Across America One International Place Suite 4600 Boston, MA 02110	PC	General	\$ 1,000 00
YMCA Southcoast 18 S Water St New Bedford, MA 02740	PC	General	1,000 00
McGill University 845 Sherbrooke Street West, Montreal, QC H3A2T5, Canada	PC	General	14,286 00
Network for Good, Inc. 1140 Connecticut Avenue NW, Suite 700 Washington, DC 20036	PC	Joslin Diabetes Center	564 00
University of North Carolina Eshelman School of Pharmacy CB# 7355 Chapel Hill, NC 27599	PC	Shirley Hurwitz Pauli Pharmacy Scholarship	2,232.00
Arthritis Foundation, Inc 25 Crafts St Newton, MA 02458	PC	Juvenile Arthritis Programs	1,000 00
Unitarian Universalist Association - The First Parish of Cambridge 1446 Massachusetts Avenue Cambridge, MA 02138	PC	Tuesday Meals	1,100.00
Starlight Children's Foundation 30 East Adams Street, Suite 1020 Chicago, IL 60603-5623	PC	Northwestern University Dance Marathon Fundraiser	51 94
Network for Good, Inc. 1140 Connecticut Avenue NW, Suite 700 Washington, DC 20036	PC	Joslin Diabetes Center	1,590 00
Trustees of Boston University 595 Commonwealth Avenue, Suite 700 Boston, MA 02215	PC	Medical Student Summer Research Program	2,750 00
SquashBusters, Inc. 795 Columbus Avenue, Roxbury Crossing, MA 02120	PC	General	1,000 00

The Julia Seymour Gross Foundation, Inc.
Grants Paid
June 30, 2015

Grantee	Foundation Status	Purpose of Grant	Amount
SquashBusters, Inc. 795 Columbus Avenue, Roxbury Crossing, MA 02120	PC	General	2,000 00
SquashBusters, Inc. 795 Columbus Avenue, Roxbury Crossing, MA 02120	PC	General	\$ 2,000 00
Belmont Hill School 350 Prospect Street, Belmont, MA 02478	PC	General	1,000 00
National Brain Tumor Society, Inc. 55 Chapel Street, Suite 200 Newton, MA 02458-1070	PC	General	1,000 00
Boston Youth Symphony Orchestras, Inc 855 Commonwealth Ave Boston, MA 02215	PC	General	1,000 00
Survivor Tails Animal Rescue, Inc. 11 Standish Rd Hull, MA 02045	PC	General	5,000 00
Harvard University 124 Mount Auburn Street, Cambridge, MA 02138	PC	Faculty of Arts and Sciences for the Harvard College Fund	1,000 00
Yale University - School of Architecture 180 York Street New Haven, CT 06511	PC	Educational Technology Fund in Architecture	20,000 00
Squash Haven 70 Tower Parkway New Haven, CT 06520	PC	General	10,000 00
Wesleyan University 318 High Street, Middletown, CT 06459	PC	Patrcelli Center for Social Entrepreneurship	25,000 00
Town of Weston 89 Welesley Street, Weston, MA 02493	GOV	WEEFC	1,000 00

The Julia Seymour Gross Foundation, Inc.
Grants Paid
June 30, 2015

Grantee	Foundation Status	Purpose of Grant	Amount
Stanford University Dept 34478, PO Box 39000 San Francisco, CA 94139	PC	Graduate Studies Gift Fund for Humanities and Sciences	1,000 00
Signet Society 46 Dunster St Cambridge, MA 02138	PC	General	\$ 1,000 00
St Paul's School Advanced Studies Program 325 Pleasant Street, Concord, NH 03301	PC	General	1,000 00
Resiliency for Life Framingham High School 115 A Street Framingham MA 01701	PC	General	1,000 00
Massachusetts Institute of Tech 600 Memorial Drive W98-200, 2nd Floor Cambridge MA 02139	PC	Meredith Kamm Fund	5,000 00
Darhmouth College D-H Geisel Office of Development 1 Medical Center Dr Lebanon, NH 03756	PC	The Fund for Geisel School of Medicine	1,000 00
Columbia University PO Box 1383 New York, NY 10277	PC	P&S Alumni Giving Fund	1,000 00
Harvard University 124 Mount Auburn Street Cambridge, MA 02138	PC	Havard-Cambridge Scholarships	5,000 00
Radcliffe Institute for Advanced Study 124 Mount Auburn Street Cambridge, MA 01238	PC	General	10,000 00
Harvard University 124 Mount Auburn Street Cambridge, MA 02138	PC	Parents Fund	5,000 00

The Julia Seymour Gross Foundation, Inc.
 Grants Paid
 June 30, 2015

Grantee	Foundation Status	Purpose of Grant	Amount
Harvard University 124 Mount Auburn Street Cambridge, MA 02138	PC	Faculty of Arts and Sciences	1,000 00
Harvard University 124 Mount Auburn Street Cambridge, MA 02138	PC	Faculty of Arts and Sciences	\$ 1,000 00
Total Grants:			<u>\$ 128,573 94</u>