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

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

Intern	al Rev	venue Service Information about F	orm 990-PF and its separate	instructions is at www.	lrs.gov/form990pf.	Open to Public Inspection
For	calen	dar year 2014 or tax year beginning JU	JL 1, 2014	, and ending	JUN 30, 201	5
Nar	ne of	foundation		<del>-</del> ——	A Employer identification	n number
J	OH	AN G.W. & FRANCES S HO	LMBERG FDN			
Č	/0	Powers Law Office, PC			22-312750	6
		nd street (or P O box number if mail is not delivered to str		Room/suite	8 Telephone number	
		Washington Street	<b></b>	29	781-326-7	766
				29	<del></del>	
		own, state or province, country, and ZIP or foreign	n postal code		C If exemption application is	pending, check here
		wood, MA 02062		<del> </del>		
G C	Check	all that apply: Initial return	Initial return of a fo	ormer public charity	D 1. Foreign organization	ns, check here
		Final return	Amended return			
		Address change	Name change		Foreign organizations n check here and attach in	computation
H C	heck	type of organization: X Section 501(c)(3)	exempt private foundation		E If private foundation st	
	_	ction 4947(a)(1) nonexempt charitable trust	Other taxable private found	ation	under section 507(b)(	
L Fa			inting method: Cash	X Accrual	7 ' ' '	
		Part II, col. (c), line 16)	Other (specify)	71001841	F If the foundation is in a	
("			olumn (d) must be on cash	hacie I	under section 507(b)(	1)(D), Check here
_		Analysis of Revenue and Expenses				(4)
PE	art I	The total of amounts in columns (b), (c), and (d) may not	(a) Revenue and expenses per books	(b) Net investment	(c) Adjusted net	(d) Disbursements for charitable purposes
	,	necessarily equal the amounts in column (a))	expenses per books	income	income	(cash basis only)
	1	Contributions, gifts, grants, etc., received			N/A	
	2	Check I If the foundation is not required to attach Sch. B				
<u> </u>	3	Interest on savings and temporary cash investments				
en ay	4	Dividends and interest from securities	1,675.	1,675		Statement 1
2	5a	Gross rents			<u> </u>	
≠,	l	Net rental income or (loss)				
	_ ا	` ' <del> </del>	4,129.			
<b>⊋</b>	Da.	Net gain or (loss) from sale of assets not on line 10 Gross sales price for all				
<u> </u>	_D	assets on line 6a 97, 515.	<u> </u>	4 100		<del> </del>
<u>ڇ</u> ڙ	7	Capital gain net income (from Part IV, line 2)		4,129	' • <u> </u>	
Ž.	8	Net short-term capital gain				
<b>Z</b> ,	9	Income modifications				
ac .	10a	Gross sales less returns and allowances				
CARITY NUV Revenue	Ь	Less Cost of goods sold				
•	c	Gross profit or (loss)				
	11	Other income				
	12	Total. Add lines 1 through 11	5,804.	5,804		
	13	Compensation of officers, directors, trustees, etc	7,500.	T .		0.
	_	Other employee salaries and wages	7,500.		*	<del>                                     </del>
	14					
Ø	15	Pension plans, employee benefits	<b> </b>			
Se	16a	Legal fees			r	
ber	b	Accounting fees Stmt 2	2,000.		)• <u> </u>	0.
Ä	C	Other professional fees Stmt 3	1,024.	0	)	0.
Š	17	Interest			Si MOV 25	2015
and Administrative Expenses	18	Taxes Stmt 4	62.	0	١٠, ١٠٠٠	0.
ist	19	Depreciation and depletion			00	, <u></u>
Ë	20	Occupancy				<del></del>
₽d	21	Travel, conferences, and meetings			<del></del>	_
ĕ	22	Printing and publications				<del> </del>
ā	22		138.		).	
Operating	23	Other expenses Stmt 5	138.	<u> </u>		0.
rat	24	Total operating and administrative	40.564	_		1 _
ğ	1	expenses. Add lines 13 through 23	10,724.	C	).	0.
J	25	Contributions, gifts, grants paid	7,500.			7,500.
	26	Total expenses and disbursements.		İ		
		Add lines 24 and 25	18,224.	C	).	7,500.
	27	Subtract line 26 from line 12:				
		Excess of revenue over expenses and disbursements	<12,420.	<b>&gt;</b>		
		Net investment income (if negative, enter -0-)		5,804		
	1	Adjusted net income (if negative, enter -0-)		3,009	N/A	
	ıÜ	, Autualeu iiel iiioolile (ii negauve, enter -u-)	1	i	1 74 / 12	1

JOHAN G.W. & FRANCES S HOLMBERG FDN <u>22-3127506</u> C/O Powers Law Office, Page 2 Form 990-PF (2014) Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only Beginning of year End of year (c) Fair Market Value (b) Book Value (a) Book Value 1 Cash - non-interest-bearing 2,273. 10,073. 10,073. 2 Savings and temporary cash investments 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 b Investments - corporate stock c Investments - corporate bonds 11 Investments - tand, buildings, and equipment, basis Less accumulated depreciation 12 Investments - mortgage loans 87,722. Stmt 7 106,883. 86,664 13 Investments - other 13,925 14 Land, buildings, and equipment basis Stmt 8 13,925. Less accumulated depreciation 4,206. 1,058. 1,058. 15 Other assets (describe ► Statement 9 ) 16 Total assets (to be completed by all filers - see the 98,853. 113,362 97,795 instructions. Also, see page 1, item I) Accounts payable and accrued expenses 15,000 15,000. 18 Grants payable 19 Deferred revenue Loans from officers, directors, trustees, and other disqualified persons Mortgages and other notes payable 22 Other liabilities (describe 15,000. 15,000. 23 Total liabilities (add lines 17 through 22) Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 50 and 31 Net Assets or Fund Balances 24 Unrestricted 25 Temporarily restricted 26 Permanently restricted **▶** X Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. 0 27 Capital stock, trust principal, or current funds 0. 0. 28 Paid-in or capital surplus, or land, bldg., and equipment fund 98,362. 82,795. 29 Retained earnings, accumulated income, endowment, or other funds 82,795. 98,362 30 Total net assets or fund balances 113,362. 97,795 31 Total liabilities and net assets/fund balances **Analysis of Changes in Net Assets or Fund Balances** Part III

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	98,362.
2	Enter amount from Part I, line 27a	2	<12,420.>
3	Other increases not included in line 2 (itemize)	3	0.
4	Add lines 1, 2, and 3	4	85,942.
5	Decreases not included in line 2 (itemize) ► Unrealized Gain (Loss) on Securities	5	3,147.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	82,795.
_			

b 16,015.	_			rs Law Offi						2:	<u>2-312</u>	<u>7506</u>	Page 3
13   MPS Limited Maturity	P	<del></del>				Income		T			1		
18 MES   Limited Maturity	(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									( <b>d)</b> Date (mo., da	e sold ıy, yr.)		
American Century Diversity		MFS Limited Ma	turit	v		-				12/2	3/09	08/0	7/14
## AFFS Limited Maturity ## 12/23/09   Various   12/15/14   ## AFFS Limited Maturity ## 12/23/09   Various   ## Capital Gains Dividends  (e) Gross sales price   (f) Deprecation allowed   (g) Cost or other basis   (h) Gain or (fores)   ## 13/300.   13/301.   (s) Part (s) Pa													
MPS Limited Maturity	_			<u> </u>									
Capital Gains Dividends	_						1						
(e) Gioss sales price (ft) Deprenation allowed (or allowable) (plus expense of sale plus (plus (n) minus (g))  1. 13, 30.0.							-		<u> </u>	14/4.	3/03	vario	Jus_
1	<u>e</u>	Capital Gains	_			<del></del>	Ц.,		ļ				
1		(e) Gross sales price											
1	a	13,000.				13,30	1.						<301.
Complete only for assets showing gain in column (h) and owned by the foundation on 1231/69   Complete only for assets showing gain in column (h) and owned by the foundation on 1231/69   Complete only for assets showing gain in column (h) and owned by the foundation on 1231/69   Complete only for assets showing gain in column (h) and owned by the foundation on 1231/69   Complete only for assets showing gain in column (h) and owned by the foundation on 1231/69   Complete only for assets showing gain in column (h) and owned by the foundation on 1231/69   Complete only for assets showing gain in column (h) and owned by the foundation on 1231/69   Complete only for assets showing gain in column (h) and owned by the foundation on 1231/69   Complete only for assets showing gain in column (h) and owned by the foundation on 1231/69   Complete only for assets showing gain in column (h) and owned by the foundation on 1231/69   Complete only for assets showing gain in column (h) and owned by the foundation of the fore of the formation (h) and owned by the foundation of the foundation of the section 4940(e) for Reduced Tax on Net Investment Income   N/A    Was the foundation label for the section 4940(e) for Reduced Tax on Net Investment Income   N/A    If enter the appropriate amount in each column for each year, see the instructions before making any entries.    Column   Year   Inter (has prior part as the foundation on the gain of the foundation of the short on qualification of the foundation of the foundat													
Section 490	_												
Section   Sect	_												
Complete only for assets showing gain in column (h) and owined by the foundation on 1231/69  (i) F.M.V. as of 12/31/69  (ii) Adjusted basis (k) Excess of cot. (i) cot. (ii) cot. (iii) cot		2.50				33,00	′ •			· · · · ·			
(i) F.M.V. as of 12/31/69 (j) Adjusted basis as of 12/31/69 (ver col. (j), if any over c	<u>e</u>												900.
(i) F.M.V. as of 12/31/69 (ii) F.M.V. as of 12/31/69 (iii)		Complete only for assets showin	ng gain in c	olumn (h) and owned by t	the foundation	n on 12/31/69			()	) Gains (C	ol. (h) gain	minus	
Section 4940(d)(2) applies, leave this part blank.   Was the foundation lable for the section 4940(a) to an elimination before making any entries.   Section 4940(d)(2) applies, leave this part blank.   Was the foundation lable for the section 4942 tax on the distributable amount of any year in the base period years 2010   Adjusted qualifying distributions   Net value of noncharitable-use assets for 2014 from Part X, line 5     Total of line 1, column (d)   2   2   2   2   2   2   2   2   3   2   2		(i) F.M.V. as of 12/31/69							COI				
Section 4940(d)(2) applies, leave this part blank.   Was the foundation lable for the section 4940(a) to an elimination before making any entries.   Section 4940(d)(2) applies, leave this part blank.   Was the foundation lable for the section 4942 tax on the distributable amount of any year in the base period years 2010   Adjusted qualifying distributions   Net value of noncharitable-use assets for 2014 from Part X, line 5     Total of line 1, column (d)   2   2   2   2   2   2   2   2   3   2   2	8												<301.
Capital gam net income or (net capital loss)   (if gam, also enter in Part I, line 7   1, 10.2													
Capital gam net income or (net capital loss)		-				•							
e	_						$\dashv$						
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 8  If gain, also enter in Part I, line 8  If gain, also enter in Part I, line 8  If gain, also enter in Part I, line 8  If gain, also enter in Part I, line 8  If gain, also enter in Part I, line 8  If gain, also enter in Part I, line 8  If gain, also enter in Part I, line 8  If gain, also enter in Part I, line 8  If gain, also enter in Part I, line 8  If gain, also enter in Part I, line 8  If gain, also enter in Part I, line 8  If gain, also enter in Part I, line 8  If gain, also enter in Part I, line 8  If gain, also enter in Part I, line 8  If gain, also enter in Part I, line 9  If gain, also enter in Part I, line 9  If gain, also enter in Part I, line 9  If gain, also enter in Part I, line 9  If gain, also enter in Part I, line 9  If gain, also enter in Part I, line 9  If gain, also enter in Part I, line 7  If gain, also enter in Part I, line 7  If gain, also enter in Part I, line 7  If gain, also enter in Part I, line 7  If gain, also enter in Part I, line 7  If gain, also enter in Part I, line 7  If gain, also enter in Part I, line 7  If gain, also enter in Part I, line 7  If gain, also enter in Part I, line 7  If gain, also enter in Part I, line 7  If gain, also enter in Part I, line 7  If gain, also enter in Part I, line 7  If gain, also enter in Part I, line 7  If gain, also enter in Part I, line 7  If gain, also enter in Part I, line 7  If gain, also enter in Part I, line 7  If gain, also enter in Part I, line 7  If gain, also enter in Part I, line 7  If gain, also enter in Part I, line 8  If gain, also enter in Part I, line 8  If gain, also enter in Part I, line 8  If gain, also enter in Part I, line 9  If gain, also enter in Part I, line 9  If gain, also enter in Part I, line 9  If gain, also enter in Part I, line 9  If gain, also enter in Part I, line 9  If gain, also enter in Part I, line 9  If gain, also enter in Part I, line 9  If gain, also enter in Part I, line 9  If gai								-				<u> </u>	
2 Capital gain net income or (net capital Joss) { if (loss), enter -0- in Part I, line 7 } 2	<u>e</u>												960.
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 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	2	Capital gain net income or (net ca	apıtal loss)				}	2				4	,129.
It floss), enter -0: in Part I, line 8 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?  If Yes X No If Yes, the foundation does not qualify under section 4940(e). Do not complete this part.  Enter the appropriate amount in each column for each year; see the instructions before making any entries.  (b) Base period years Catendar year (or tax year beginning in)  Adjusted qualifying distributions Net value of noncharitable-use assets (cot. (b) divided by cot. (c))  2013  7,500.  112,318.  .066775 2012  5,000.  112,318066775 2012  5,000.  1140,684000000 2010  10,000. 1577,201063613 2009  17,462. 164,908105889  2 Total of line 1, column (d) 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  4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5  Multiply line 4 by line 3  6 Enter 1% of net investment income (1% of Part I, line 27b)  7 Add lines 5 and 6  8 Enter qualifying distributions from Part XII, line 4  If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.	3	Net short-term capital gain or (los	ss) as defin										
Part V   Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income							1						
(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?  Inter the appropriate amount in each column for each year; see the instructions before making any entries.  (a)  Base period years (a)  Calendar year (or tax year beginning in)  Adjusted qualifying distributions  7,500.  112,318.  066775  2012  5,000.  112,318.  039930  2011  0.  140,684.  000000  2010  10,000.  157,201.  063613  2009  17,462.  164,908.  105889  Total of line 1, column (d)  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  4. Enter the net value of noncharitable-use assets for 2014 from Part X, line 5  6. Enter 1% of net investment income (1% of Part I, line 27b)  6. Enter qualifying distributions from Part XII, line 4  If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.			•				Л	3			N/A		
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 X No     Yes, the foundation does not qualify under section 4940(e). Do not complete this part.    Enter the appropriate amount in each column for each year, see the instructions before making any entries.    Rese period years	F	Part V   Qualification U	Inder S	ection 4940(e) for	Reduced	Tax on Net	Inv	estm	nent Inc	ome			
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	/Fr	or ontional use by domestic private	e foundatio	ns subject to the section 4	4940(a) tax on	net investment in	ncome	e )					
Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?    Yes	(, ,	or optional doo by domodia private	o rouridadio	110 000 1001 10 1110 00011011	10 10(4) 121 011			··,					
Trees, the foundation does not qualify under section 4940(e). Do not complete this part.   Enter the appropriate amount in each column for each year; see the instructions before making any entries.   Calendar year (or tax year beginning in)	If s	section 4940(d)(2) applies, leave tl	his part bla	nk.									
Trees, the foundation does not qualify under section 4940(e). Do not complete this part.   Enter the appropriate amount in each column for each year; see the instructions before making any entries.   Calendar year (or tax year beginning in)												<b>—</b>	
Enter the appropriate amount in each column for each year; see the instructions before making any entries.    (a)   (b)   (c)   (c						•	riod?					Yes	LX No
Base pend years   Adjusted qualifying distributions   Net value of noncharitable-use assets   Col. (b) divided by col. (c)	<u>If °</u>	Yes," the foundation does not qua	lify under s	ection 4940(e). Do not co	omplete this pa	art.							
Base period years   Adjusted qualifying distributions   Net value of noncharitable-use assets   Col. (b) divided by col. (c)	1	Enter the appropriate amount in	each colun	nn for each year; see the ii	nstructions be	fore making any e	entries	S.					
Calendar year (or tax year beginning in)   Adjusted qualifying distributions   Net value of noncharitable-use assets   Cool. (b) divided by col. (c)		(a)		(b)			(c)	)			Distri	(d)	
2013		Base period years Calendar year (or tax year beginn)	ına ın)		tributions	Net value of no			use assets		col. (b) dı)	rided by col.	(c))
2012   5,000	_		"'9 "'' <i>)</i>					11	2 210		(00 (0) 0		
2011 0 10,000 157,201	_			·									
2010 10,000 157,201	_												
2 Total of line 1, column (d) 2 .276207 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  4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5  5 Multiply line 4 by line 3  6 Enter 1% of net investment income (1% of Part I, line 27b)  7 Add lines 5 and 6  8 Enter qualifying distributions from Part XII, line 4  If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.		2011											
2 Total of line 1, column (d) 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 .055241 4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5 5 Multiply line 4 by line 3 5 .5,522. 6 Enter 1% of net investment income (1% of Part I, line 27b) 6 .5 .5 .5 .5 .5 .5 .5 .5 .5 .5 .5 .5 .5		2010		<u>1</u>	0,000.			<u> 15</u>	<u>7,201</u>	. •			
2 Total of line 1, column (d) 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 .055241 4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5 5 Multiply line 4 by line 3 5 .5,522. 6 Enter 1% of net investment income (1% of Part I, line 27b) 6 .5 .5 .5 .5 .5 .5 .5 .5 .5 .5 .5 .5 .5	_	2009		1	7,462.			<u> </u>	4,908			1	<u>05889</u>
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  4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5  5 Multiply line 4 by line 3  6 Enter 1% of net investment income (1% of Part I, line 27b)  7 Add lines 5 and 6  8 Enter qualifying distributions from Part XII, line 4  If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.	_												
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  4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5  5 Multiply line 4 by line 3  6 Enter 1% of net investment income (1% of Part I, line 27b)  7 Add lines 5 and 6  8 Enter qualifying distributions from Part XII, line 4  If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.	9	Total of line 1 column (d)								,		. 2	76207
the foundation has been in existence if less than 5 years  4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5  5 Multiply line 4 by line 3  6 Enter 1% of net investment income (1% of Part I, line 27b)  7 Add lines 5 and 6  7 Enter qualifying distributions from Part XII, line 4  If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.			E von	a nariad dauda tha tatal	on line O his C	or hu ti s numb	. of	2050		-		• 4	, 0 2 0 1
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5  5 Multiply line 4 by line 3  5 Enter 1% of net investment income (1% of Part I, line 27b)  6 Add lines 5 and 6  7 Fig. 5.80.  8 Enter qualifying distributions from Part XII, line 4  If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.	3				on line 2 by 5,	, or by the number	or ye	ears				^	F F O 4 4
5 5,522.  6 Enter 1% of net investment income (1% of Part I, line 27b)  6 58.  7 Add lines 5 and 6  7 5,580.  8 Enter qualifying distributions from Part XII, line 4  If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.		the foundation has been in existe	ence if less	than 5 years						3			<u>55241</u>
5 5,522.  6 Enter 1% of net investment income (1% of Part I, line 27b)  6 58.  7 Add lines 5 and 6  7 5,580.  8 Enter qualifying distributions from Part XII, line 4  If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.	A Enter the net value of goneharitable-use assets for 2014 from Part Y line 5					4		99	.961.				
6 Enter 1% of net investment income (1% of Part I, line 27b)  7 Add lines 5 and 6  7 5,580.  8 Enter qualifying distributions from Part XII, line 4  If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.	•		5,5 555 455	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,									<u>, , , , , , , , , , , , , , , , , , , </u>
7 Add lines 5 and 6  8 Enter qualifying distributions from Part XII, line 4  If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.	5	5 Multiply line 4 by line 3				5		5	<u>,522.</u>				
7 Add lines 5 and 6  8 Enter qualifying distributions from Part XII, line 4  If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.		S. Enter 1% of net investment income (1% of Part I line 97h)											
8 Enter qualifying distributions from Part XII, line 4  If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.	6	Enter 1% of net investment incor	me (1% of	Part I, line 27b)						6			<u>5</u> 8.
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.	6	Enter 1% of net investment incor	me (1% of	Part I, line 27b)						6	_		58.
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.			me (1% of	Part I, line 27b)							_	5	
	7	Add lines 5 and 6								7	_		,580 <u>.</u>

JOHAN G.W. & FRANCES S HOLMBERG FDN Form 990-PF (2014) C/O Powers Law Office 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 \( \bigcup \leftarrow \ \_ (attach copy of letter if necessary-see instructions) Date of ruling or determination letter: b Domestic foundations that meet the section 4940(e) requirements in Part V, check here X and enter 1% 58. 1 of Part I, line 27b c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b). 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 58. 3 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-5 6 Credits/Payments: a 2014 estimated tax payments and 2013 overpayment credited to 2014 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 0. 8 Enter any penalty for underpayment of estimated tax. Check here \_\_\_\_\_ 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 58. 9 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Enter the amount of line 10 to be: Credited to 2015 estimated tax Refunded > Part VII-A | Statements Regarding Activities Yes No 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 1a b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? 1b 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? X 1c 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. ► \$ e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. > \$ 0. X 2 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 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 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 4a N/A b If "Yes," has it filed a tax return on Form 990-T for this year? 4h 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 5 If "Yes," attach the statement required by General Instruction T. 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: · 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? 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 7

Form 990-PF (2014)

8b

10

MA

8a Enter the states to which the foundation reports or with which it is registered (see instructions)

of each state as required by General Instruction G? If "No," attach explanation

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)

year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? If "Yes," complete Part XIV

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

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

JOHAN G.W. & FRANCES S HOLMBERG FDN

	990-PF(2014) C/O Powers Law Office, PC 22-312	<u>7506</u>	ſ	Page <b>5</b>
Р	art VII-A Statements Regarding Activities (continued)			
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		<u>x</u> _
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?  If "Yes," attach statement (see instructions)	12	•	X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?  Website address   N/A	13	Х	
14	The books are in care of ▶ POWERS LAW OFFICE, PC  Telephone no. ▶ 781-3	<u> 26-7</u>	766	
	Located at ▶ 470 Washington St, Norwood, MA ZIP+4 ▶0	<u> 2062</u>		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here		<b>,</b> ▶	
40	and enter the amount of tax-exempt interest received or accrued during the year  15	N	/A Yes	No
16	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank,	16	163	X
	securities, or other financial account in a foreign country?	10		
	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			
Pε	art VII-B Statements Regarding Activities for Which Form 4720 May Be Required			
<u>_</u>	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?			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
	a disqualified person?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			
	(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)?			
	(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.)	-		
t	of the any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations		· ·	
	section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here			
C	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected	4.		v
	before the first day of the tax year beginning in 2014?	10	-	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?  Yes X No			
			ŀ	
	If "Yes," list the years \( \sum_{\text{inst}} \), \( \text{inst} \),			
	valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to <b>all</b> years listed, answer "No" and attach		1	
	T / 2	2b		
	statement - see instructions.)  If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here.	20		
(	the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years liefe.			
3:	a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time		1	
٠,	during the year?			1
ı	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		
4:	a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		Х
	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 separaty before the first day of the tay year beginning in 20142	Ah	1	Y

JOHAN G.W. & FRANCES S HOLMBERG FDN Form 990-PF (2014) C/O Powers Law Office, 22-3127506 Page 6 Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued) 5a During the year did the foundation pay or incur any amount to: Yes X No (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, Yes X No any voter registration drive? Yes X No (3) Provide a grant to an individual for travel, study, or other similar purposes? (4) Provide a grant to an organization other than a charitable, etc., organization described in section Yes X No 4945(d)(4)(A)? (see instructions) (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for 🗌 Yes 🕱 No the prevention of cruelty to children or animals? b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations N/A section 53.4945 or in a current notice regarding disaster assistance (see instructions)? 5b Organizations relying on a current notice regarding disaster assistance check here c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? Yes No If "Yes," attach the statement required by Regulations section 53.4945-5(d). 6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on 🗌 Yes 🗶 No a personal benefit contract? b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 6b Х If "Yes" to 6b, file Form 8870 Yes X No 7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? 7b b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors 1 List all officers, directors, trustees, foundation managers and their compensation. (d) Contributions to employee benefit plans and deferred compensation (c) Compensation (e) Expense account, other (b) Title, and average hours per week devoted (If not paid, (a) Name and address enter -0-) allowances MICHAEL J. POWERS DIRECTOR 470 Washington Street 0. Norwood, MA 02062 1.00 7,500 0 2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE." (d) Contributions to employee benefit plans and deferred compensation (b) Title, and average (e) Expense account, other hours per week devoted to position (a) Name and address of each employee paid more than \$50,000 (c) Compensation allowances NONE

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

## JOHAN G.W. & FRANCES S HOLMBERG FDN

Form 990-PF (2014) C/O Powers Law Office, PC		3127506 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundary Paid Employees, and Contractors (continued)	ation Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, ente	r "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 statis number of organizations and other beneficiaries served, conferences convened, research papers pro	stical information such as the duced, etc.	Expenses
1 <u>N/A</u>		
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 or	n lines 1 and 2.	Amount
1 <u>N/A</u>		
2	-	
All other program-related investments. See instructions.  3		

Form **990-PF** (2014

Total. Add lines 1 through 3

22-3127506 Page 8

c Fair market value of all other assets d Total (add lines 1a, b, and c) e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)  Acquisition indebtedness applicable to line 1 assets  Subtract line 2 from line 1d  Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	6,521. 4,962.
c Fair market value of all other assets d Total (add lines 1a, b, and c) e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)  2 Acquisition indebtedness applicable to line 1 assets  3 Subtract line 2 from line 1d  4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)  4 Leave value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4  5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4  6 Minimum investment return. Enter 5% of line 5  6 Minimum investment return. Enter 5% of line 5  6 Minimum investment return from Part V, line 6  2a Tax on investment income for 2014 from Part VI, line 5  b Income tax for 2014. (This does not include the tax from Part VI.)  c Add lines 2a and 2b  Distributable amount before adjustments. Subtract line 2c from line 1  4 Recoveries of amounts treated as qualifying distributions  4 Add lines 3 and 4  Distributable amount (see instructions)  7 Distributable amount (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  b Program-related investments - total from Part I, column (d), line 26  Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	
c Fair market value of all other assets  d Total (add lines 1a, b, and c)  e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)  2 Acquisition indebtedness applicable to line 1 assets  3 Subtract line 2 from line 1d  4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)  4 Let value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4  5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4  6 Ninimum investment return. Enter 5% of line 5  6 Part XI Distributable Amount (see instructions) (Section 4942(i)(3) and (i)(5) private operating foundations and certain foreign organizations check here land on ot complete this part.)  1 Minimum investment income for 2014 from Part VI, line 5  2 Tax on investment income for 2014 from Part VI, line 5  3 Distributable amount before adjustments. Subtract line 2c from line 1  4 Recoveries of amounts treated as qualifying distributions  4 Add lines 2 and 2 b  5 Add lines 3 and 4  6 Deduction from distributable amount (see instructions)  7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1  7 Part XII  Qualifying Distributions (see instructions)  1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:  a Expenses, contributions, giffs, etc total from Part I, column (d), line 26  b Program-related investments - total from Part IV. B  2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	-
d Total (add lines 1a, b, and c) e Reduction claimed for blockage or other factors reported on lines 1a and to (attach detailed explanation) 2 Acquisition indebtedness applicable to line 1 assets 3 Subtract line 2 from line 1d 4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) 4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) 6 Met value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 5 9 6 Minimum investment return. Enter 5% of line 5 6 Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here in and do not complete this part.)  1 Minimum investment return from Part X, line 6 2 Tax on investment income for 2014 from Part VI, line 5 5 lincome tax for 2014. (This does not include the tax from Part VI.) 2 c Add lines 2a and 2b 3 Distributable amount before adjustments. Subtract line 2c from line 1 4 Recoveries of amounts treated as qualifying distributions 4 Recoveries of amounts treated as qualifying distributions 5 Add lines 3 and 4 6 Deduction from distributable amount (see instructions) 7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 7 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 b Program-related investments - total from Part IX-B 2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	1,483.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)  2 Acquisition indebtedness applicable to line 1 assets  3 Subtract line 2 from line 1d  4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)  4 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4  5 96 Minimum investment return. Enter 5% of line 5  Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here and on one complete this part.)  Minimum investment return from Part X, line 6  1 1 2a Tax on investment income for 2014 from Part VI, line 5  b income tax for 2014. (This does not include the tax from Part VI.)  c Add lines 2a and 2b  3 Distributable amount before adjustments. Subtract line 2c from line 1  4 Recoveries of amounts treated as qualifying distributions  4 A Recoveries of amounts treated as qualifying distributions  5 Add lines 3 and 4  6 Deduction from distributable amount (see instructions)  7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1  7 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 IX-B  b Program-related investments - total from Part IX-B  1b Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	
1c (attach detailed explanation)  2 Acquisition indebtedness applicable to line 1 assets  3 Subtract line 2 from line 1d  4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)  4 Very value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4  5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4  6 Minimum investment return. Enter 5% of line 5  Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here and on one complete this part.)  1 Minimum investment return from Part X, line 6  2a Tax on investment income for 2014 from Part VI, line 5  b income tax for 2014. (This does not include the tax from Part VI.)  c Add lines 2a and 2b  Distributable amount before adjustments. Subtract line 2c from line 1  4 Recoveries of amounts treated as qualifying distributions  4 Are dounts paid including administrative expenses) to accomplish charitable, etc., purposes:  a Expenses, contributions, girfs, etc total from Part IX-B  2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes  2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	
Acquisition indebtedness applicable to line 1 assets  Subtract line 2 from line 1d  Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)  Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4  Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here  and on to complete this part.)  Minimum investment return from Part X, line 6  Tax on investment income for 2014 from Part VI, line 5  Income tax for 2014. (This does not include the tax from Part VI.)  Add lines 2a and 2b  Distributable amount before adjustments. Subtract line 2c from line 1  Recoveries of amounts treated as qualifying distributions  Add lines 3 and 4  Deduction from distributable amount (see instructions)  Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1  Part XII Qualifying Distributions (see instructions)  Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:  Expenses, contributions, gifts, etc total from Part I, column (d), line 26  Program-related investments - total from Part IX-B  Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	
3 Subtract line 2 from line 1d 4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) 5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 5 9 6 Minimum investment return. Enter 5% of line 5 6 Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here	0.
4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)  5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4  6 Minimum investment return. Enter 5% of line 5  6 Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here and on ot complete this part.)  1 Minimum investment return from Part X, line 6  2a Tax on investment income for 2014 from Part VI, line 5  b Income tax for 2014. (This does not include the tax from Part VI.)  c Add lines 2a and 2b  2c Distributable amount before adjustments. Subtract line 2c from line 1  Recoveries of amounts treated as qualifying distributions  4 A Recoveries of amounts treated as qualifying distributions  5 Add lines 3 and 4  6 Deduction from distributable amount (see instructions)  7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1  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  b Program-related investments - total from Part IX-B  2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	1,483.
Section 4 From line 3. Enter here and on Part V, line 4  6 Minimum investment return. Enter 5% of line 5  Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here	1,522.
6 Minimum investment return. Enter 5% of line 5  Part XI Distributable Amount (see instructions) (Section 4942(i)(3) and (i)(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 2a Tax on investment income for 2014 from Part VI, line 5 b Income tax for 2014. (This does not include the tax from Part VI.)  c Add lines 2a and 2b 2c 3 Distributable amount before adjustments. Subtract line 2c from line 1 4 Recoveries of amounts treated as qualifying distributions 4 Recoveries of amounts treated as qualifying distributions 5 Add lines 3 and 4 6 Deduction from distributable amount (see instructions) 7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1  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 b Program-related investments - total from Part IX-B 2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes 2	9,961.
Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here	4,998.
foreign organizations check here and do not complete this part.)  1 Minimum investment return from Part X, line 6  2a Tax on investment income for 2014 from Part VI, line 5  b Income tax for 2014. (This does not include the tax from Part VI.)  c Add lines 2a and 2b  3 Distributable amount before adjustments. Subtract line 2c from line 1  4 Recoveries of amounts treated as qualifying distributions  5 Add lines 3 and 4  6 Deduction from distributable amount (see instructions)  7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1  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  b Program-related investments - total from Part IX-B  2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	
2a 58.  b Income tax for 2014. (This does not include the tax from Part VI.)  c Add lines 2a and 2b  3 Distributable amount before adjustments. Subtract line 2c from line 1  4 Recoveries of amounts treated as qualifying distributions  5 Add lines 3 and 4  6 Deduction from distributable amount (see instructions)  7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1  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  b Program-related investments - total from Part IX-B  2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	
b Income tax for 2014. (This does not include the tax from Part VI.)  c Add lines 2a and 2b  2c  3 Distributable amount before adjustments. Subtract line 2c from line 1  4 Recoveries of amounts treated as qualifying distributions  5 Add lines 3 and 4  6 Deduction from distributable amount (see instructions)  7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1  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  b Program-related investments - total from Part IX-B  2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	4,998.
c Add lines 2a and 2b 3 Distributable amount before adjustments. Subtract line 2c from line 1 4 Recoveries of amounts treated as qualifying distributions 5 Add lines 3 and 4 6 Deduction from distributable amount (see instructions) 7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1  Part XIII 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 b Program-related investments - total from Part IX-B 2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes 2	
3 Distributable amount before adjustments. Subtract line 2c from line 1 4 Recoveries of amounts treated as qualifying distributions 5 Add lines 3 and 4 6 Deduction from distributable amount (see instructions) 7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 7 Part XIII 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 b Program-related investments - total from Part IX-B 2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes 2	
4 Recoveries of amounts treated as qualifying distributions 5 Add lines 3 and 4 6 Deduction from distributable amount (see instructions) 7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 7 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 b Program-related investments - total from Part IX-B 2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes 2	58.
5 Add lines 3 and 4 6 Deduction from distributable amount (see instructions) 7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 7 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 b Program-related investments - total from Part IX-B 2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes 2	4,940.
6 Deduction from distributable amount (see instructions) 7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 7 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 b Program-related investments - total from Part IX-B 2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes 2	0.
7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1  7 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  b Program-related investments - total from Part IX-B  2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes  2	4,940.
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  b Program-related investments - total from Part IX-B  2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes  2	0.
Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:  a Expenses, contributions, gifts, etc total from Part I, column (d), line 26  b Program-related investments - total from Part IX-B  Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes  2	4,940.
1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:  a Expenses, contributions, gifts, etc total from Part I, column (d), line 26  b Program-related investments - total from Part IX-B  2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes  2	
a Expenses, contributions, gifts, etc total from Part I, column (d), line 26 b Program-related investments - total from Part IX-B 2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes 2	
b Program-related investments - total from Part IX-B  2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes  2	
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<u>7,500.</u>
l i	0.
3. Amounts set aside for specific charitable projects that satisfy the:	
Validating our delication obtained by allow mar action, and	
a Suitability test (prior IRS approval required)	
b Cash distribution test (attach the required schedule)	
4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	7,500.
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	58.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	7,442.
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	

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## Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2013	(c) 2013	( <b>d</b> ) 2014
1 Distributable amount for 2014 from Part XI,	· · · · · · · · · · · · · · · · · · ·			
line 7				4,940.
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:		<u> </u>		
a From 2009 9, 293.				
b From 2010 2,242.				
<b>c</b> From 2011				
d From 2012				
e From 2013 1,946.				
f Total of lines 3a through e	13,481.			
4 Qualifying distributions for 2014 from				
Part XII, line 4: ►\$				
a Applied to 2013, but not more than line 2a			0.	
<b>b</b> Applied to undistributed income of prior				
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus		<del></del>		
(Election required - see instructions)	0.			
d Applied to 2014 distributable amount				4,940.
e Remaining amount distributed out of corpus	2,560.			
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	16,041.			
b Prior years' undistributed income. Subtract		<del></del>		
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			1	
not applied on line 5 or line 7	9,293.			<u> </u>
9 Excess distributions carryover to 2015.				
Subtract lines 7 and 8 from line 6a	6,748.			<del> </del>
10 Analysis of line 9:			1	
a Excess from 2010 2,242.				
b Excess from 2011				
c Excess from 2012	:			
d Excess from 2013 1,946.				
e Excess from 2014 2,560.	<u> </u>			Form <b>990-PF</b> (2014)
11-24-14				romi <b>330-PF</b> (2014)

Part XIV Private Operating Fo	oundations (see inst		-A, question 9)	N/A	2,500
1 a if the foundation has received a ruling or	determination letter that i	t is a private operating		<del></del>	
foundation, and the ruling is effective for			•		
b Check box to indicate whether the found	•	-	n section	4942(j)(3) or 49	942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years		1
income from Part I or the minimum	(a) 2014	(b) 2013	(c) 2012	(d) 2011	(e) Total
investment return from Part X for		·			
each year listed			1		
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 Info			if the foundation	n had \$5,000 or m	ore in assets
at any time during t	he year-see instr	uctions.)			
1 Information Regarding Foundation	n Managers:				
a List any managers of the foundation wh			tributions received by the	e foundation before the clo	ose of any tax
year (but only if they have contributed r	nore than \$5,000). (See se	ection 507(d)(2).)			
None					
b List any managers of the foundation when other entity) of which the foundation ha			(or an equally large port	on of the ownership of a p	partnership or
None	-				
2 Information Regarding Contribut	ion, Grant, Gift I can	Scholarship etc. P	rograms:		
Check here X if the foundation of				not accept unsolicited red	uests for funds. If
the foundation makes gifts, grants, etc.					
a The name, address, and telephone num	<del> </del>				
a mo namo, address, and telephone nam	Dol of o man address of a	To portion to military			
<b>b</b> The form in which applications should l	pe submitted and informat	ion and materials they s	should include:		<u> </u>
c Any submission deadlines:					
d Any restrictions or limitations on award	s, such as by geographica	l areas, charitable fields	, kınds of ınstitutions, or	other factors:	

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Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Recipient Foundation Purpose of grant or show any relationship to Amount status of contribution any foundation manager Name and address (home or business) or substantial contributor recipient a Paid during the year Meghan S. Lynch None N/A Educational c/o 470 Washington Street Norwood MA 02062 2,500. Erin Cahill None N/A Educational c/o 470 Washington Street 2,500, Norwood MA 02062 N/A Joseph M Gilmore III None Educational c/o 470 Washington Street 2,500. Norwood MA 02062 ➤ 3a 7.500. Total b Approved for future payment N/A Educational Meghan S. Lynch None c/o 470 Washington Street 2,500. Norwood MA 02062 Erin Cahill None Educational c/o 470 Washington Street Norwood, MA 02062 5,000. N/A Educational Paul Calobrisi None c/o 470 Washington Street Norwood MA 02062 7.500. **▶** 3b <u>Total</u> 15 000

423611

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Part XVI-A	of Income-P	roducing Activities		
		Unrelated business income	Evaluded by costion 612, 513, or 514	

1101 91001	amounts unless otherwise indicated.	Unrelated t	ousiness income		led by section 512, 513, or 514	(e)
D		(a) Business	(b) Amount	(C) Exclu- sion code	(d) Amount	Related or exempt function income
_	n service revenue:	code		- Wde		
						-
	· · · · · · · · · · · · · · · · · · ·	t l	<del></del>	+		
	<del> </del>	1 1		1 -		_
				1		
e				<del>                                     </del>		
T	and contracts from agreement aganges	<del>                                     </del>	·	+ +		
•	and contracts from government agencies			+ 1		
	rship dues and assessments			<del>  </del>		
	on savings and temporary cash					
Investm		-		+ -	· <del>-</del> ·	1,675
	ds and interest from securities		- '	+	-	1,073
	tal income or (loss) from real estate:	<b>+</b>		-		
	t-financed property			<del> </del>		<del></del> -
	debt-financed property	<del>   </del>		+ +		
	tal income or (loss) from personal					
propert				+		-
	vestment income	<del></del>		+ -		
	(loss) from sales of assets other					4,129
than inv		<del>                                     </del>		+ +		4,149
	ome or (loss) from special events	<del></del>		1		
-	profit or (loss) from sales of inventory	<del></del>		+		
Other re	evenue:					
a		·		+		
b		-				
·. —		-				
° —		·	<del></del>			
e	(a) bad (b) (d) and (a)	·	0	+	0.	5,804
	al. Add columns (b), (d), and (e)	LL	<u> </u>	•		5,804
	Add line 12, columns (b), (d), and (e) sheet in line 13 instructions to verify calculations.)				18_	<u> </u>
	sneet in line 13 instructions to vertiv calculations.1			<del></del>	<del> </del>	
ee works				VAMN	t Purposes	
		to the Accor	nplishment of E	vemb		
ee works Part X	VI-B Relationship of Activities				outed importantly to the accord	nnlishment of
ee works Part X ine No.	VI-B Relationship of Activities  Explain below how each activity for which inc	ome is reported in	column (e) of Part XVI-		outed importantly to the accord	nplishment of
Part X ine No.	VI-B Relationship of Activities  Explain below how each activity for which incide the foundation's exempt purposes (other than	ome is reported in n by providing fund	column (e) of Part XVI-, Is for such purposes).	A contrib		
ee works Part X ine No.	Explain below how each activity for which inc the foundation's exempt purposes (other than CHARITABLE CONTRIBUTION)	ome is reported in a by providing func	column (e) of Part XVI- is for such purposes). VED TO PROV	A contrib	AN INVESTMEN	T BASE ON
ee works Part X ine No.	Explain below how each activity for which inc the foundation's exempt purposes (other that CHARITABLE CONTRIBUTION WHICH TO EARN INVESTME	ome is reported in by providing functions RECEI	column (e) of Part XVI- is for such purposes). VED TO PROV	A contrib	AN INVESTMEN	T BASE ON
Part X ine No.	Explain below how each activity for which inc the foundation's exempt purposes (other than CHARITABLE CONTRIBUTION)	ome is reported in by providing functions RECEI	column (e) of Part XVI- is for such purposes). VED TO PROV	A contrib	AN INVESTMEN	T BASE ON
ee works Part X ine No.	Explain below how each activity for which inc the foundation's exempt purposes (other that CHARITABLE CONTRIBUTION WHICH TO EARN INVESTME	ome is reported in by providing functions RECEI	column (e) of Part XVI- is for such purposes). VED TO PROV	A contrib	AN INVESTMEN	T BASE ON
ee works Part X ine No.	Explain below how each activity for which inc the foundation's exempt purposes (other that CHARITABLE CONTRIBUTION WHICH TO EARN INVESTME	ome is reported in by providing functions RECEI	column (e) of Part XVI- is for such purposes). VED TO PROV	A contrib	AN INVESTMEN	T BASE ON
ee works Part X ine No.	Explain below how each activity for which inc the foundation's exempt purposes (other that CHARITABLE CONTRIBUTION WHICH TO EARN INVESTME	ome is reported in by providing functions RECEI	column (e) of Part XVI- is for such purposes). VED TO PROV	A contrib	AN INVESTMEN	T BASE ON
Part X ine No.	Explain below how each activity for which inc the foundation's exempt purposes (other that CHARITABLE CONTRIBUTION WHICH TO EARN INVESTME	ome is reported in by providing functions RECEI	column (e) of Part XVI- is for such purposes). VED TO PROV	A contrib	AN INVESTMEN	T BASE ON
ee works Part X ine No.	Explain below how each activity for which inc the foundation's exempt purposes (other that CHARITABLE CONTRIBUTION WHICH TO EARN INVESTME	ome is reported in by providing functions RECEI	column (e) of Part XVI- is for such purposes). VED TO PROV	A contrib	AN INVESTMEN	T BASE ON
ee works Part X ine No.	Explain below how each activity for which inc the foundation's exempt purposes (other that CHARITABLE CONTRIBUTION WHICH TO EARN INVESTME	ome is reported in by providing functions RECEI	column (e) of Part XVI- is for such purposes). VED TO PROV	A contrib	AN INVESTMEN	T BASE ON
ee works Part X ine No.	Explain below how each activity for which inc the foundation's exempt purposes (other that CHARITABLE CONTRIBUTION WHICH TO EARN INVESTME	ome is reported in by providing functions RECEI	column (e) of Part XVI- is for such purposes). VED TO PROV	A contrib	AN INVESTMEN	T BASE ON
ee works Part X ine No.	Explain below how each activity for which inc the foundation's exempt purposes (other that CHARITABLE CONTRIBUTION WHICH TO EARN INVESTME	ome is reported in by providing functions RECEI	column (e) of Part XVI- is for such purposes). VED TO PROV	A contrib	AN INVESTMEN	T BASE ON

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Part X	VII	Information Re Exempt Organi		sfers To a	ind Transactions a	and Relationsl	nips With Non	charitable	
4 Did+	he orga			of the follows:	g with any other organization	on described in secti	on 501(c) of		Yes No
	_	-			y with any other organization, relating to political organ		on 50 I(c) or		163 140
	-	om the reporting founda				IIZaliUIIS*			
		on the reporting rounds	mon to a noncharita	nie exempt ort	janization of.			10(1)	v
	Cash Other a	costo						1a(1)	X
								1a(2)	A
b Othe			hla avamat organizai	tion.				45/45	v
. ,		f assets to a noncharitat ses of assets from a nor						1b(1) 1b(2)	V
		of facilities, equipment, (		n yannzanon					- X
		rsement arrangements						1b(3)	- A
		or loan guarantees						1b(4)	- X
		nance of services or me	mharchin or fundrai	eina eolicitatio	ne			1b(5) 1b(6)	X   X   X   X   X   X   X   X   X   X
		acilities, equipment, mai						10(0)	X
			-		dule. Column ( <b>b)</b> should al	wave show the fair m	narket value of the o		
				_	ed less than fair market vali		_		J.10,
		the value of the goods, o					or orialing arrange.		
(a) Line no	<del>_``</del>	) Amount involved	<del></del>		exempt organization	(d) Description	of transfers, transaction	ns, and sharing arra	angements
`	† -	·		N/A	· ·	1,,,	· · · · · ·		
	<b>†</b>							·	
	1								
					· · · — · · ·				
	1								
		-							
2a Is th	e found	ation directly or indirect	tly affiliated with, or	related to, one	or more tax-exempt organ	izations described			
		01(c) of the Code (other		)(3)) or in sect	ion 527?			Yes	X No
<b>b</b> If "Y	es," con	nplete the following scho				1			
		(a) Name of org	janization		(b) Type of organization		(c) Description of re	lationship	
		N/A			<u> </u>				
						1			
				-		<del> </del>	·		
						<del> </del>			
	I Index o	analties of person, I declare	that I have exampled th	ie return, includir	g accompanying schedules and	d statements, and to the	heet of my knowledge		
Sign					n taxpayer) is based on all infor			May the IRS of return with the	discuss this e preparer
Here		T // //w//			سن من د ا	Le Lini		shown below	(see instr )?
	Signa	ture of officer or trustee	1. Forme	<del>~</del> ,	8-14-15 Date	Title	<b>L</b>	_ LXJ Yes	∟ No
		Print/Type preparer's na	+/	Preparer's s		Date	Check X If	PTIN	
		i illib i ype preparer 3 lie	21110	Concrete	ignaturo	) bate	self- employed		
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Prepa	rer	Janice A. Firm's name ► Jan		do, CP	<u> </u>	Mathra	Fırm's EİN ▶ 4		
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	- L	Firm's address 🕨 🔉 🤉	10 Haverfo	rd Ave	nue Suite 3				
					, CA 90272		Phone no.		
			.crro rui				1. 110110_1101_	Form <b>99</b> 0	<b>)-PF</b> (2014)