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2014

Department of the Treasury
Internal Revenue Serviceor Section 4947(a)(1) Trust Treated as Private Foundation
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Open to Public Inspection

For calendar year 2014 or tax year beginning OCT 1, 2014, and ending SEP 30, 2015

Name of foundation BERT L & N KUGGIE VALLEE FOUNDATION, INC		A Employer identification number 04-3333757
Number and street (or P.O. box number if mail is not delivered to street address) 745 BOYLSTON STREET, 7TH FLOOR	Room/suite	B Telephone number 617-859-6600
City or town, state or province, country, and ZIP or foreign postal code BOSTON, MA 02116		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 checked="" 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) \$ 43,861,207.	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		0.			
2 Check <input checked="" type="checkbox"/> If the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		11,865.	11,865.	11,865.	STATEMENT 1
4 Dividends and interest from securities		1,309,299.	1,309,299.	1,309,299.	STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		5,991.			
b Gross sales price for all assets on line 6a		5,991.			
7 Capital gain net income (from Part IV, line 2)			5,991.		
8 Net short-term capital gain				5,991.	
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		1,327,155.	1,327,155.	1,327,155.	
13 Compensation of officers, directors, trustees, etc.		147,000.	0.	0.	147,000.
14 Other employee salaries and wages					
15 Pension plans, employee benefits		13,138.	0.	0.	13,138.
16a Legal fees STMT 3		50,445.	0.	0.	50,445.
b Accounting fees STMT 4		16,661.	0.	0.	16,661.
c Other professional fees STMT 5		107,930.	76,372.	0.	31,558.
17 Interest					
18 Taxes STMT 6		166,080.	0.	0.	166,080.
19 Depreciation and depletion					
20 Occupancy		35,960.	0.	0.	35,960.
21 Travel, conferences, and meetings		127,561.	0.	0.	127,561.
22 Printing and publications					
23 Other expenses STMT 7		82,612.	0.	0.	82,612.
24 Total operating and administrative expenses. Add lines 13 through 23		747,387.	76,372.	0.	671,015.
25 Contributions, gifts, grants paid		853,207.			853,207.
26 Total expenses and disbursements. Add lines 24 and 25		1,600,594.	76,372.	0.	1,524,222.
27 Subtract line 26 from line 12		-273,439.			
a Excess of revenue over expenses and disbursements			1,250,783.		
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)				1,327,155.	

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	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1 Cash - non-interest-bearing	2,192,318.	780,971.	780,971.		
	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					
	Liabilities	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 STATEMENT 8)		43,661,132.	44,799,040.	43,080,236.		
16 Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)		45,853,450.	45,580,011.	43,861,207.		
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					
	and complete lines 24 through 26 and lines 30 and 31.					
	24 Unrestricted					
	25 Temporarily restricted					
	26 Permanently restricted					
	Foundations that do not follow SFAS 117, check here					
	and complete lines 27 through 31.					
	27 Capital stock, trust principal, or current funds	21,082,759.	21,082,759.			
28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.				
29 Retained earnings, accumulated income, endowment, or other funds	24,770,691.	24,497,252.				
30 Total net assets or fund balances	45,853,450.	45,580,011.				
31 Total liabilities and net assets/fund balances	45,853,450.	45,580,011.				

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	45,853,450.
2 Enter amount from Part I, line 27a	2	-273,439.
3 Other increases not included in line 2 (itemize)	3	0.
4 Add lines 1, 2, and 3	4	45,580,011.
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	45,580,011.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
1a SHORT TERM CAPITAL GAINS - DETAIL AVAILABLE			
b UPON REQUEST	P		09/30/15
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			
b 5,991.			5,991.
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			5,991.
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	5,991.
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	5,991.

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	2,527,315.	38,784,310.	.065163
2012	360,939.	22,776,373.	.015847
2011	348,446.	9,935,387.	.035071
2010	226,625.	9,504,515.	.023844
2009	783,688.	8,659,096.	.090505

2 Total of line 1, column (d)	2	.230430
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	.046086
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	46,954,983.
5 Multiply line 4 by line 3	5	2,163,967.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	12,508.
7 Add lines 5 and 6	7	2,176,475.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions	8	1,524,222.

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	25,016.
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	25,016.
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	25,016.
6 Credits/Payments			
a 2014 estimated tax payments and 2013 overpayment credited to 2014	6a	35,685.	
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	35,685.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	76.	
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	10,593.	
11 Enter the amount of line 10 to be credited to 2015 estimated tax. Refunded	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"/> MA		
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

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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 ► THEVALLEEFUNDATION.ORG	13	X	
14	The books are in care of ► ALEXA MASON Telephone no ► 617-859-6600 Located at ► 745 BOYLSTON STREET, 7TH FLOOR, BOSTON, MA ZIP+4 ► 02116			
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 type="checkbox"/> Yes <input checked="" 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		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?		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	
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	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		X

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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?

N/A

☐ 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 9		147,000.	13,138.	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

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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
RACKEMANN, SAWYER & BREWSTER - 160 FEDERAL STREET, 15TH FL., BOSTON, MA 02110	LEGAL	50,445.

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 SEE STATEMENT 14	
	767,500.
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.

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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	45,758,613.
b	Average of monthly cash balances	1b	1,911,420.
c	Fair market value of all other assets	1c	0.
d	Total (add lines 1a, b, and c)	1d	47,670,033.
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	47,670,033.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	715,050.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	46,954,983.
6	Minimum investment return. Enter 5% of line 5	6	2,347,749.

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

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	1,524,222.
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	1,524,222.
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	1,524,222.

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

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Part XIII Undistributed Income (see instructions)

N/A

	(a) Corpus	(b) Years prior to 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only				
b Total for prior years				
3 Excess distributions carryover, if any, to 2014				
a From 2009				
b From 2010				
c From 2011				
d From 2012				
e From 2013				
f Total of lines 3a through e				
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$				
a Applied to 2013, but not more than line 2a				
b Applied to undistributed income of prior years (Election required - see instructions)				
c Treated as distributions out of corpus (Election required - see instructions)				
d Applied to 2014 distributable amount				
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount - see instructions				
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount - see instr				
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)				
8 Excess distributions carryover from 2009 not applied on line 5 or line 7				
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2010				
b Excess from 2011				
c Excess from 2012				
d Excess from 2013				
e Excess from 2014				

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

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

07/09/97

- b Check box to indicate whether the foundation is a private operating foundation described in section

☒ 4942(j)(3) or ☐ 4942(j)(5)

- 2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

- b 85% of line 2a

- c Qualifying distributions from Part XII, line 4 for each year listed

- d Amounts included in line 2c not used directly for active conduct of exempt activities

- e Qualifying distributions made directly for active conduct of exempt activities

- 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

Tax year	Prior 3 years			(e) Total
(a) 2014	(b) 2013	(c) 2012	(d) 2011	
1,327,155.	1,401,710.	542,607.	241,967.	3,513,439.
1,128,082.	1,191,454.	461,216.	205,672.	2,986,423.
1,524,222.	2,657,610.	360,939.	348,446.	4,891,217.
0.	0.	0.	0.	0.
1,524,222.	2,657,610.	360,939.	348,446.	4,891,217.
				0.
				0.
1,565,166.	1,292,811.	361,738.	161,311.	3,381,026.
				0.
				0.
				0.
				0.

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

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

NONE

- b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

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

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

- c Any submission deadlines

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

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

Recipient	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
Name and address (home or business)				
a Paid during the year				
AMERICAN SOCIETY FOR BIOCHEMISTRY AND MOLECULAR BIOLOGY 11200 ROCKVILLE PIKE, SUITE 302 ROCKVILLE, MD 20852	NONE	PC	AWARD	10,000.
LINDAU NOBEL LAUREATE MEETING FOUNDATION LENNART-BERNADOTTE-HAUS ALFRED-NOBEL PLATZ 1 88131 LINDAU, GERMANY	NONE	PC	LINDAU FELLOWSHIP PROGRAM	23,207.
KAI SIMONS MAX PLANCK INST. OF MOLECULAR CELL BIOLOGY PFOTENHAUERSTRASSE 108 01307 DRESDEN, GERMANY	NONE	NC	VISITING PROFESSORSHIP PROGRAM	17,500.
NICHOLAS TONKS COLD SPRING HARBOR LABORATORY 1 BUNGTOWN ROAD COLD SPRING HARBOR, NY 11724	NONE	NC	VISITING PROFESSORSHIP PROGRAM	17,500.
BONNIE BASSLER DEPT. OF MOLECULAR BIOLOGY PRINCETON UNIVERSITY 119 LEWIS THOMAS LABORITORY WASHINGTON ROAD PRINCETON, NJ 08544-1014	NONE	NC	VISITING PROFESSORSHIP PROGRAM	17,500.
Total			SEE CONTINUATION SHEET(S)	853,207.
b Approved for future payment				
NONE				
Total				0.

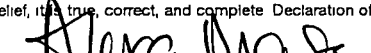
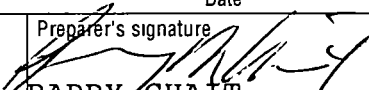
Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

- | | | Yes | No |
|----------|--|-------|----|
| 1 | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of | | |
| | (1) Cash | 1a(1) | X |
| | (2) Other assets | 1a(2) | X |
| b | Other transactions | | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b(1) | X |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | X |
| | (3) Rental of facilities, equipment, or other assets | 1b(3) | X |
| | (4) Reimbursement arrangements | 1b(4) | X |
| | (5) Loans or loan guarantees | 1b(5) | X |
| | (6) Performance of services or membership or fundraising solicitations | 1b(6) | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | X |
| d | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | |

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No
- b** If "Yes," complete the following schedule

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

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.				May the IRS discuss this return with the preparer shown below (see instr.)? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
	 Signature of officer or trustee		02/01/16 Date		EXECUTIVE DIRECTOR Title		
Paid Preparer Use Only	Print/Type preparer's name		Preparer's signature		Date	Check <input type="checkbox"/> if self-employed	PTIN
	BARRY CHAIT		 BARRY CHAIT		01/25/16	<input type="checkbox"/>	P01452996
	Firm's name ▶ MARCUM LLP					Firm's EIN ▶ 11-1986323	
	Firm's address ▶ 53 STATE STREET, FLOOR 38 BOSTON, MA 02109					Phone no (617) 807-5000	

Recipient	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
Name and address (home or business)				
DAVID HOLOWKA DEPT OF CHEMISTRY & CHEMICAL BIOLOGY CORNELL UNIVERSITY ITHACA, NY 14853-1301	NONE	NC	VISITING PROFESSORSHIP PROGRAM	17,500.
KAROLINSKA INSITUTET DEPT OF CELL & MOLECULAR BIOLOGY VON EULERS VAG 1 17177 STOCKHOLM, SWEDEN	NONE	PC	YOUNG INVESTIGATOR PROGRAM	250,000.
LUDWIG-MAXIMILIANS-UNIVERSITAT MUNCHEN FEODOR-LYNEN-STR. 25 81377 MUNICH, GERMANY	NONE	PC	YOUNG INVESTIGATOR PROGRAM	250,000.
UNIVERSITAT ZURICH RAMISTRASSE 71 ZURICH, SWEDEN CH-8006	NONE	PC	YOUND INVESTIGATOR PROGRAM	250,000.
Total from continuation sheets				767,500.

BERT L. AND N. KUGGIE VALLEE FOUNDATION, INC.

EIN: 04-3333757

FORM 990-PF

FYE: SEPTEMBER 30, 2015

MINIMUM INVESTMENT RETURN

Securities and ETFs		Charles Schwab		Wellington	
09/30/14	\$	44,096,386.61	\$	30,200,249.62	\$ 13,896,136.99
10/31/14	\$	45,252,310.54	\$	30,793,951.11	\$ 14,458,359.43
11/30/14	\$	45,809,373.39	\$	31,118,086.81	\$ 14,691,286.58
12/31/14	\$	45,884,532.65	\$	31,118,086.81	\$ 14,766,445.84
01/31/15	\$	45,130,856.54	\$	30,238,691.49	\$ 14,892,165.05
02/28/15	\$	47,006,267.92	\$	31,699,828.30	\$ 15,306,439.62
03/31/15	\$	46,784,547.33	\$	31,395,666.83	\$ 15,388,880.50
04/30/15	\$	46,988,901.07	\$	31,799,249.16	\$ 15,189,651.91
05/31/15	\$	47,300,701.93	\$	32,001,948.95	\$ 15,298,752.98
06/30/15	\$	46,355,262.81	\$	31,290,352.47	\$ 15,064,910.34
07/31/15	\$	46,744,793.91	\$	31,371,315.66	\$ 15,373,478.25
08/31/15	\$	44,352,373.96	\$	29,683,808.95	\$ 14,668,565.01
09/30/15	\$	43,155,654.77	\$	28,720,687.92	\$ 14,434,966.85
Average monthly fair market value of securities		\$ 45,758,612.57			

Cash		Charles Schwab		Citizens Checking		Citizens MM Savings	
09/30/14	\$	2,447,261.26	\$	154,413.56	\$ 341,492.76	\$	1,951,354.94
10/31/14	\$	2,091,381.97	\$	154,414.65	\$ 9,123.88	\$	1,927,843.44
11/30/14	\$	2,126,517.11	\$	207,296.53	\$ 19,961.42	\$	1,899,259.16
12/31/14	\$	2,050,543.90	\$	207,296.53	\$ (2,435.44)	\$	1,845,682.81
01/31/15	\$	2,021,643.74	\$	27,298.09	\$ 17,919.15	\$	1,976,426.50
02/28/15	\$	1,865,771.21	\$	27,400.20	\$ 10,648.54	\$	1,827,722.47
03/31/15	\$	1,887,637.42	\$	75,283.98	\$ 48,261.53	\$	1,764,091.91
04/30/15	\$	1,848,255.04	\$	75,284.41	\$ 37,577.26	\$	1,735,393.37
05/31/15	\$	1,817,964.79	\$	75,285.03	\$ 6,919.92	\$	1,735,759.84
06/30/15	\$	1,682,787.09	\$	75,285.67	\$ 71,410.89	\$	1,536,090.53
07/31/15	\$	1,626,603.09	\$	75,286.29	\$ 14,521.35	\$	1,536,795.45
08/31/15	\$	1,327,952.41	\$	75,286.93	\$ 64,991.80	\$	1,187,673.68
09/30/15	\$	2,054,144.20	\$	75,418.06	\$ 27,371.20	\$	1,951,354.94
Average of monthly cash balances		\$ 1,911,420.25					

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	11,865.	11,865.	11,865.
TOTAL TO PART I, LINE 3	11,865.	11,865.	11,865.

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
SCHWAB	1,047,826.	0.	1,047,826.	1,047,826.	1,047,826.
WELLINGTON	261,473.	0.	261,473.	261,473.	261,473.
TO PART I, LINE 4	1,309,299.	0.	1,309,299.	1,309,299.	1,309,299.

FORM 990-PF LEGAL FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	50,445.	0.	0.	50,445.
TO FM 990-PF, PG 1, LN 16A	50,445.	0.	0.	50,445.

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	16,661.	0.	0.	16,661.
TO FORM 990-PF, PG 1, LN 16B	16,661.	0.	0.	16,661.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
INVESTMENT FEES	76,372.	76,372.	0.	0.	
WEBSITE	3,761.	0.	0.	3,761.	
OTHER SERVICES	27,797.	0.	0.	27,797.	
TO FORM 990-PF, PG 1, LN 16C	107,930.	76,372.	0.	31,558.	

FORM 990-PF	TAXES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FEDERAL TAX	154,072.	0.	0.	154,072.	
PAYROLL TAX	12,008.	0.	0.	12,008.	
TO FORM 990-PF, PG 1, LN 18	166,080.	0.	0.	166,080.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
BOARD MEETINGS	36,312.	0.	0.	36,312.	
OPERATIONS	2,615.	0.	0.	2,615.	
SERVICES	21,313.	0.	0.	21,313.	
PAYROLL	1,341.	0.	0.	1,341.	
TELEPHONE, TELECOMMUNICATIONS	1,154.	0.	0.	1,154.	
INSURANCE	7,933.	0.	0.	7,933.	
SUPPLIES	899.	0.	0.	899.	
GENERAL EXPENSES	11,045.	0.	0.	11,045.	
TO FORM 990-PF, PG 1, LN 23	82,612.	0.	0.	82,612.	

FORM 990-PF	OTHER ASSETS		STATEMENT	8
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE	
CHARLES SCHWAB MUTUAL FUNDS	29,650,113.	30,596,933.	28,645,269.	
WELLINGTON CTF	14,011,019.	14,202,107.	14,434,967.	
TO FORM 990-PF, PART II, LINE 15	43,661,132.	44,799,040.	43,080,236.	

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT	9
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
S. JAMES ADESLTEIN, MD 180 LONGWOOD AVE, RM 207-A BOSTON, MA 02115	DIRECTOR/PAST PRESIDENT 5.00	0.	0.	0.
PETER CAMPOT 45 RIVER ROAD TOPSFIELD, MA 01983-2108	DIRECTOR/TREASURER 5.00	0.	0.	0.
LEWIS C CANTLEY CANCER CENTER, WEILL CORNELL MEDICAL COLLEGE, 1300 YORK AVE, F-905B NEW YORK, NY 10065	DIRECTOR 5.00	0.	0.	0.
EDMOND H FISCHER 5440 N.E. WINDEMERE ROAD SEATTLE, WA 98105	DIRECTOR 5.00	0.	0.	0.
LOUISE GROSS 420 EAST 79TH STREET, APT. 5A NEW YORK, NY 10021	DIRECTOR 5.00	0.	0.	0.
JESPER Z HAEGGSTROM, MD, PHD DEPARTMENT OF PHYSIOLOGICAL CHEMISTRY II, KAROLINSKA INSTITUTET STOCKHOLM, SWEDEN S-171 77	DIRECTOR 5.00	0.	0.	0.

GORDON G HAMMES 6545 VALEN WAY, F301 NAPLES, FL 34108	DIRECTOR/VICE PRES.&SECRETARY 5.00	0.	0.	0.
PETER HOWLEY, MD HARVARD MEDICAL SCHOOL, NEW RESEARCH BUILDING, ROOM 950A, 77 AVENUE LOUIS BOSTON, MA 02115	DIRECTOR/PRESIDENT 5.00	0.	0.	0.
DAVID OGDEN, AB, AMP 32 BELTED KINGFISHER FERNANDINA BEACH, FL 32034-6401	DIRECTOR 5.00	0.	0.	0.
SHEILA OHLUND SEESTRASSE 662 MEILEN, SWITZERLAND 8706	DIRECTOR 5.00	0.	0.	0.
ERNST-LUDWIG WINNACKER 14 RUE STOEBER STRASBOURG, FRANCE 6700	DIRECTOR 5.00	0.	0.	0.
ALEXA MASON BERT L. & N. KUGGIE VALLEE FOUNDATION INC; 745 BOYLSTON STREET, 7TH FLOOR BOSTON, MA 02116	EXECUTIVE DIRECTOR 35.00	147,000.	13,138.	0.
MICHAEL F. O'CONNELL, JD C/O RACKEMANN, SAWYER & BREWSTER, 160 FEDERAL STREET, 15TH FL. BOSTON, MA 02110-1700	ASSISTANT SECRETARY 5.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		<u>147,000.</u>	<u>13,138.</u>	<u>0.</u>

BERT L. AND N. KUGGIE VALLEE FOUNDATION, INC.

EIN: 04-3333757

FORM 990-PF

FYE: SEPTEMBER 20, 2015

STATEMENT 14

PART IX-A: SUMMARY OF DIRECT CHARITABLE ACTIVITIES

The organization directly serves the advancement of scientific education by (i) organizing and arranging short-term visiting professorships of distinguished scientists at university in the United States and abroad, (ii) organizing and overseeing research by distinguished scientists and other scholars on biomedical research projects of specific interest to the organization, and (iii) organizing and conducting seminars and symposia.

The purpose of the Vallee visiting professorship program, the young investigator program, the Lindau fellowship program, and the seminars and symposia is to facilitate interactions among productive scientists and to expose dedicated students and researchers to scientists who are making outstanding contributions towards the understanding of scientific principles as they relate to human biology. As part of the educational and scientific activities and functions occurring during the tenure of the respective visiting professors, the organization arranges symposia, tutorials, lectures and conferences for other scientists, non-scientists and students.

During the fiscal year,

A) Vallee Visiting Professorship Program

The organization organized, funded and oversaw the research programs of the following visiting research scholars at the following institutions:

Visiting Professors (Affiliation)

Institution

Kai Simons (Max Planck Institute for Molecular Cell Biology and Genetics)
Harvard Medical School, Boston, MA

Nicholas Tonks (Cold Spring Harbor Laboratory)
Monash University, Melbourne, Australia

David Holowka & Barbara Baird (Cornell University)
Weil Cornell Medical School and University of Singapore

Bonnie Bassler (Princeton University)
Max Planck Institute for Infection Biology, Berlin

B) Vallee Symposia Program

The organization organized, funded, and operated a symposium in June 2015 in Cambridge, MA, which highlighted some of the diverse biomedical research being undertaken by scientists affiliated with the Bert L & N Kuggie Vallee Foundation. Speakers at the event included five recipients of the Foundation's Young Investigator Awards and one Vallee Visiting Professor who presented an array of work addressing

BERT L. AND N. KUGGIE VALLEE FOUNDATION, INC.

EIN: 04-3333757

FORM 990-PF

FYE: SEPTEMBER 20, 2015

critical questions in biology, from organismal development to human disease.

C) Young Investigator Program

The organization organized, funded, and oversaw ongoing research programs of the following young investigators at the following institutions:

Young Investigator	Institution
Sandeep Robert Datta	Harvard University Medical School, Boston, MA
Danelle Devenport	Princeton University, Princeton, NJ
J��rome Gros	Institut Pasteur, Paris, France
Martin Jinek	University of Zurich, Switzerland
Christopher Mason	Weill-Cornell Medical College, NYC
Fabiana Perocchi	Ludwig-Maximilians University, Munich, Germany
Rickard Sandberg	Karolinska Institutet, Stockholm, Sweden
Kirsty Spalding	Karolinska Institutet, Stockholm, Sweden
David Tobin	Duke University Medical Center, Durham, NC
Feng Zhang	Massachusetts Institute of Technology, Cambridge, MA

D) Lindau Fellowship Program

The organization organized travel fellowships for the following postdoctoral fellows to attend the Lindau Nobel Laureates Meetings

Joanne Fothergill	University of Liverpool
Katie Harron	University College London
Agnieszka Krzyzoslak	MRC Laboratory of Molecular Biology, Cambridge
Sarah Rollauer	NIH & MRC Mitochondrial Biology Unit, Cambridge
Melda Tozluoglu	University College London
Melissa Ward PhD	University of Edinburgh)

E) The organization recognized the outstanding accomplishments in basic biomedical research of the following internationally distinguished scientist:

David Eisenberg	University of California, Los Angeles
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