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Form

990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2015

Open to Public Inspection

For calendar year 2015, or tax year beginning 01-01-2015, and ending 12-31-2015

Name of foundation THE LYNCH FOUNDATION		A Employer identification number 04-3017940	
Number and street (or P O box number if mail is not delivered to street address) 30 ROWES WHARF SUITE 600		B Telephone number (see instructions) (617) 639-1280	
City or town, state or province, country, and ZIP or foreign postal code BOSTON, MA 02110		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	
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		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 113,091,061		J Accounting method <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)	

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		Revenue and expenses per (a) books	Net investment (b) income	Adjusted net (c) income	Disbursements for charitable purposes (d) (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	8,207,126			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	954,358	954,358		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	2,417,559			
	b Gross sales price for all assets on line 6a 205,796,354				
	7 Capital gain net income (from Part IV, line 2) . . .		2,417,559		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	11,579,043	3,371,917		
	13 Compensation of officers, directors, trustees, etc	325,326	0		340,326
	14 Other employee salaries and wages	255,750	123,250		192,597
	15 Pension plans, employee benefits	58,327	11,232		86,261
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).	43,236	0		43,566
	c Other professional fees (attach schedule)	630,485	612,404		8,656
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	33,651	8,560		32,188
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy	60,000	0		65,250
	21 Travel, conferences, and meetings.	32,369	714		29,198
	22 Printing and publications				
	23 Other expenses (attach schedule).	-59,308	0		121,133
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	1,379,836	756,160		919,175
	25 Contributions, gifts, grants paid	7,849,826			7,849,826
	26 Total expenses and disbursements. Add lines 24 and 25	9,229,662	756,160		8,769,001
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	2,349,381			
	b Net investment income (if negative, enter -0-)		2,615,757		
	c Adjusted net income (if negative, enter -0-) . . .				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	4,259,405	1,708,250	1,708,250
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions).			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	71,287	127,626	127,626
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	115,655,534	107,696,518	107,696,518
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans.			
	13	Investments—other (attach schedule)	3,188,461	3,558,667	3,558,667
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets(to be completed by all filers—see the instructions Also, see page 1, item I)	123,174,687	113,091,061	113,091,061	
Liabilities	17	Accounts payable and accrued expenses	51,288	31,119	
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule).			
	22	Other liabilities (describe ▶ _____)	313,104	62,755	
	23	Total liabilities(add lines 17 through 22)	364,392	93,874	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted	122,810,295	112,997,187	
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances(see instructions)	122,810,295	112,997,187	
31	Total liabilities and net assets/fund balances(see instructions)	123,174,687	113,091,061		

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	122,810,295
2	Enter amount from Part I, line 27a	2	2,349,381
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	125,159,676
5	Decreases not included in line 2 (itemize) ▶ _____	5	12,162,489
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	112,997,187

Part IV

Capital Gains and Losses for Tax on Investment Income

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)		How acquired P—Purchase (b) D—Donation	Date acquired (c) (mo , day, yr)	Date sold (d) (mo , day, yr)
1 a	PUBLICLY TRADED SECURITIES			
b				
c				
d				
e				
(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)	
a 205,796,354		203,378,795	2,417,559	
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			Gains (Col (h) gain minus col (k), but not less than -0-) or (l) Losses (from col (h))	
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any		
a			2,417,559	
b				
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	2,417,559
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 }		3	

Part V

Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)
If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see 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))
2014	9,651,184	122,043,958	0 079080
2013	10,123,126	110,626,758	0 091507
2012	8,233,196	91,734,744	0 089750
2011			
2010			
2	Total of line 1, column (d).		2 0 260337
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years		3 0 086779
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.		4 114,291,299
5	Multiply line 4 by line 3.		5 9,918,085
6	Enter 1% of net investment income (1% of Part I, line 27b).		6 26,158
7	Add lines 5 and 6.		7 9,944,243
8	Enter qualifying distributions from Part XII, line 4.		8 8,769,001
If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions			


Part VI

Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the 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	52,315
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	52,315
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	52,315
6		Credits/Payments			
a	2015 estimated tax payments and 2014 overpayment credited to 2015		6a	171,362	
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	171,362
8		Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached.		8	
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	119,047
11		Enter the amount of line 10 to be Credited to 2015 estimated tax <input type="checkbox"/> 119,047 Refunded <input type="checkbox"/>		11	0

Part VII-A

Statements Regarding Activities

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?		Yes	No
		1a		No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?			No
	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?	1c		No
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.	2		No
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		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6		No
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.	7	Yes	
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 .	8b	Yes	
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 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses. 	10	Yes	

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		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶THELYNCHFOUNDATION.COM	13	Yes	
14	The books are in care of ▶KATHRYN EVERETT EXECUTIVE DIRECTOR Telephone no ▶(617) 639-1280 Located at ▶30 ROWES WHARF SUITE 600 BOSTON MA ZIP+4 ▶02110			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ▶	15		
16	At any time during calendar year 2015, 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 instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶	16	Yes	No

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 type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. ▶ <input type="checkbox"/>	1b		
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 2015? <input type="checkbox"/>	1c		No
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 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions). <input type="checkbox"/>	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2015 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015.</i>) <input type="checkbox"/>	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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 2015?	4b		No

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)?

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 a personal benefit contract?

☐ Yes ☒ No

b

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

6b

No

If "Yes" to 6b, file Form 8870.

7a

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

☐ Yes ☒ No

b

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

7b

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1

List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
See Additional Data Table				

2

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

(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	Contributions to employee benefit plans and deferred compensation (d)	Expense account, (e) other allowances
DAVID BADEAU 30 ROWES WHARF SUITE 600 BOSTON, MA 02110	RESEARCH ANALYST 20 00	123,250	11,232	0
VICTORIA FORMAN 30 ROWES WHARF SUITE 600 BOSTON, MA 02110	OPERATIONS MANAGER 40 00	72,500	13,092	0
NICOLAS JOFRE 30 ROWES WHARF SUITE 600 BOSTON, MA 02110	FELLOW 40 00	60,000	8,188	0
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 (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
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	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 	0

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	111,094,753
b	Average of monthly cash balances.	1b	4,809,397
c	Fair market value of all other assets (see instructions).	1c	127,626
d	Total (add lines 1a, b, and c).	1d	116,031,776
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	116,031,776
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	1,740,477
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	114,291,299
6	Minimum investment return. Enter 5% of line 5.	6	5,714,565

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	5,714,565
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	52,315
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	52,315
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	5,662,250
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	5,662,250
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	5,662,250

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	8,769,001
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	8,769,001
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	8,769,001
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2014	(c) 2014	(d) 2015
1 Distributable amount for 2015 from Part XI, line 7				5,662,250
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2015				
a From 2010.				
b From 2011.				
c From 2012.				3,868,430
d From 2013.				5,208,895
e From 2014.				3,816,869
f Total of lines 3a through e.	12,894,194			
4 Qualifying distributions for 2015 from Part XII, line 4 ▶ \$ 8,769,001				
a Applied to 2014, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2015 distributable amount.				5,662,250
e Remaining amount distributed out of corpus	3,106,751			
5 Excess distributions carryover applied to 2015 (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	16,000,945			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2016 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 2010 not applied on line 5 or line 7 (see instructions). . .	0			
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a.	16,000,945			
10 Analysis of line 9				
a Excess from 2011.				
b Excess from 2012.				3,868,430
c Excess from 2013.				5,208,895
d Excess from 2014.				3,816,869
e Excess from 2015.				3,106,751

Part XIV

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

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2015, enter the date of the ruling.

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
		(a) 2015	(b) 2014	(c) 2013	(d) 2012	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed					
d	Amounts included in line 2c not used directly for active conduct of exempt activities					
e	Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter (1) Value of all assets (2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . .					
c	"Support" alternative test—enter (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). (3) Largest amount of support from an exempt organization (4) Gross investment income					

Part XV

Supplementary Information (Complete this part only if the organization 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))

See Additional Data Table

b

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

2

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

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

a

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

KATHRYN M EVERETT
30 ROWES WHARF SUITE 600
BOSTON,MA 02110
(617) 639-1280

b

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

ALL REQUESTS ARE SUBMITTED ELECTRONICALLY THROUGH THE LYNCH FOUNDATION WEBSITE
WWW.THELYNCHFOUNDATION.COM APPLICANTS SHOULD FILL OUT THE CONCEPT PAPER WHICH INCLUDES INFORMATION ABOUT THE ORGANIZATION, DESCRIPTION OF REQUEST AND OBJECTIVES OF THEIR REQUEST

c

Any submission deadlines

THE CONCEPT PAPERS ARE REVIEWED ON A ROLLING PROCESS

d

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

ORGANIZATIONS MUST BE A 501(C)(3) ORGANIZATION THAT PERFORMS WORK IN MASSACHUSETTS AND BE UNDER THE GIVING GUIDELINES OF EDUCATION, CULTURE AND HISTORIC PRESERVATION, HEALTHCARE AND MEDICAL RESEARCH, AND RELIGIOUS AND EDUCATIONAL EFFORTS OF THE ROMAN CATHOLIC CHURCH

Form 990-PF (2015)

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 See Additional Data Table				
Total			3a	7,849,826
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a	N/A					
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments.					
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities.			14	954,358	
5	Net rental income or (loss) from real estate					
a	Debt-financed property.					
b	Not debt-financed property.					
6	Net rental income or (loss) from personal property					
7	Other investment income.					
8	Gain or (loss) from sales of assets other than inventory			18	2,417,559	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue a _____					
b	_____					
c	_____					
d	_____					
e	_____					
12	Subtotal Add columns (b), (d), and (e).		0		3,371,917	0
13	Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations)			13		3,371,917

[illegible]

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.

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

[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

**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.

* * * * *

2016-05-11

* * * * *

Signature of officer or trustee

Date

Title

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

☒ Yes ☐ No

**Paid
Preparer
Use
Only**

Print/Type preparer's name DAVID KELLEHER CPA	Preparer's Signature	Date 2016-05-10	Check if self-employed <input checked="" type="checkbox"/>	PTIN P01059560
Firm's name <input checked="" type="checkbox"/> ALEXANDER ARONSON FINNING & CO PC			Firm's EIN <input checked="" type="checkbox"/> 04-2571780	
Firm's address <input checked="" type="checkbox"/> 21 EAST MAIN STREET WESTBOROUGH, MA 01581			Phone no (508) 366-9100	

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation(If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
PETER S LYNCH	PRESIDENT AND CHAIRMAN 1 00	0	0	0
30 ROWES WHARF SUITE 600 BOSTON,MA 02110				
CAROLYN A LYNCH	PRESIDENT 1 00	0	0	0
30 ROWES WHARF SUITE 600 BOSTON,MA 02110				
RICHARD SPILLANE	TREASURER 1 00	0	0	0
30 ROWES WHARF SUITE 600 BOSTON,MA 02110				
ELIZABETH DE MONTICHARD	SECRETARY 1 00	0	0	0
30 ROWES WHARF SUITE 600 BOSTON,MA 02110				
J FREDERICK BUSH	TRUSTEE 1 00	0	0	0
30 ROWES WHARF SUITE 600 BOSTON,MA 02110				
NANCY R COOLIDGE	TRUSTEE 1 00	0	0	0
30 ROWES WHARF SUITE 600 BOSTON,MA 02110				
RALPH C SWEETLAND MD	TRUSTEE 1 00	0	0	0
30 ROWES WHARF SUITE 600 BOSTON,MA 02110				
ANNIE LUKOWSKI	TRUSTEE 1 00	0	0	0
30 ROWES WHARF SUITE 600 BOSTON,MA 02110				
MARY WITKOWSKI	TRUSTEE 1 00	0	0	0
30 ROWES WHARF SUITE 600 BOSTON,MA 02110				
KATHRYN M EVERETT	EXECUTIVE DIRECTOR 40 00	318,276	44,703	0
30 ROWES WHARF SUITE 600 BOSTON,MA 02110				

Form 990PF Part XV Line 1a - 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).

PETER S LYNCH
CAROLYN A LYNCH

Form 990PF Part XV Line 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				
ADOPT-A-STUDENT FOUNDATION PO BOX 960188 BOSTON,MA 02196		NC	SCHOLARSHIP SUPPORT FOR CATHEDRAL HIGH SCHOOL SOUTH END	50,000
ALMA DEL MAR CHARTER SCHOOL 26 MADEIRA AVENUE NEW BEDFORD,MA 02746		NC	PROGRAM EXPANSION	25,000
ARCHDIOCESE OF BOSTON ST PETER 278 BOWDOIN STREET DORCHESTER,MA 02125		NC	ST PETER TEEN CENTER, DORCHESTER	50,000
ARTISTS FOR HUMANITY 100 W 2ND STREET BOSTON,MA 02127		NC	CAPITAL CAMPAIGN	325,000
ASSOCIATED GRANT MAKERS 133 FEDERAL STREET SUITE 802 BOSTON,MA 02110		NC	MEMBERSHIP	5,500
BOSTON DEBATE LEAGUE 225 FRIEND STREET 401 BOSTON,MA 02114		NC	PROGRAM EXPANSION IN BPS	200,000
BOSTON EDUCATIONAL DEVELOPMENT FUND 2300 WASHINGTON STREET 5TH FLOOR ROXBURY,MA 02119		NC	BOSTON PUBLIC SCHOOLS HUMAN CAPITAL PROJECT	375,000
BOSTON SCHOOLS FUND 31 HEATH STREET BOSTON,MA 02130		NC	INCREASE ACCESS TO HIGH QUALITY SCHOOLS IN BOSTON	1,003,775
BOSTON SYMPHONY ORCHESTRA 301 MASSACHUSETTS AVENUE BOSTON,MA 02115		NC	BOSTON CHILDREN PROGRAM	25,000
BOSTON TENPOINT COALITION 150 WARREN STREET ROXBURY,MA 02119		NC	YOUTH VOICE FOR PEACE INITIATIVE	100,000
BOYS AND GIRLS CLUB OF BOSTON 50 CONGRESS STREET SUITE 730 BOSTON,MA 02109		NC	CLUBHOUSE EXPANSION	150,000
CATHEDRAL OF THE HOLY CROSS 1400 WASHINGTON STREET BOSTON,MA 02118		NC	HISTORIC PRESERVATION AND RENOVATION	100,000
CATHOLIC RELIEF SERVICES 228 W LEXINGTON STREET BALTIMORE,MD 21201		NC	GENERAL OPERATING SUPPORT	25,000
CATHOLIC SCHOOLS FOUNDATION 260 FRANKLIN STREET SUITE 630 BOSTON,MA 02110		NC	PROGRAM EXPANSION FOR BOSTON CATHOLIC SCHOOLS	100,000
CITY YEAR BOSTON 287 COLUMBUS AVENUE BOSTON,MA 02116		NC	SUPPORT IN BPS	25,000
Total				7,849,826

Form 990PF Part XV Line 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				
COLLEGE BOUND DORCHESTER 18 SAMOSET STREET DORCHESTER,MA 02124		NC	EXPANSION OF COLLEGE ACCESS PROGRAM	125,000
DANA FARBER CANCER INSTITUTE 450 BROOKLINE AVENUE BOSTON,MA 02215		NC	TRIBUTE GIFT	250
EAST BOSTON CENTRAL CATHOLIC 69 LONDON STREET EAST BOSTON,MA 02128		NC	EARLY CHILDHOOD PROGRAM	13,426
ESSEX COMMUNITY FOUNDATION 175 ANDOVER STREET DANVERS,MA 01923		NC	ACCELERATION ACADEMIES IN LAWRENCE PUBLIC SCHOOLS	101,275
FIRST NIGHT FIRST DAY ONE DESIGN CENTER PLACE BOSTON,MA 02210		NC	NEW YEAR CITY CELEBRATION	5,000
GARDEN CLUB OF THE BACK BAY 10 CHARLES STREET BOSTON,MA 02114		NC	GENERAL OPERATING SUPPORT	2,500
HARVARD MEDICAL SCHOOL 25 SHATTUCK STREET BOSTON,MA 02115		NC	SYSTEMS BIOLOGY PHD PROGRAM	250,000
HENRY FRANCIS DUPONT WINTERTHUR MUSEUM 5105 KENNETT PIKE WILMINGTON,DE 19735		NC	BOSTON FOUR CENTURIES OF FURNITURE ARCHIVE PROJECT	100,000
INNERCITY WEIGHTLIFTING PO BOX 171313 BOSTON,MA 02117		NC	PROGRAM EXPANSION IN BOSTON	100,000
LYNCH LEADERSHIP ACADEMY 140 COMMONWEALTH AVENUE CHESTNUT HILL,MA 02467		NC	LEADERSHIP TRAINING PROGRAM FOR K12 PRINCIPALS	2,000,750
MALTESER INTERNATIONAL AMERICAS 75 VALENCIA AVENUE SUITE 702 CORAL GABLES,FL 33134		NC	GENERAL OPERATING SUPPORT	20,000
MENTOR THE NATIONAL MENTORING PARTNERSHIP 201 SOUTH STREET 6TH FLOOR BOSTON,MA 02111		NC	GENERAL OPERATING SUPPORT	25,000
MISSION GRAMMAR SCHOOL 94 ST ALPHONSUS STREET ROXBURY,MA 02120		NC	EARLY CHILDHOOD PROGRAM	13,429
MY BROTHER'S KEEPER PO BOX 338 EASTON,MA 02356		NC	GENERAL OPERATING SUPPORT	25,000
NATIONAL CENTER ON TIME & LEARNING 1647 24 SCHOOL STREET BOSTON,MA 02108		NC	1647 FAMILY ENGAGEMENT PROGRAM, LAWRENCE	25,000
Total				7,849,826


Form 990PF Part XV Line 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				
NATIONAL COUNCIL ON TEACHER QUALITY 1120 G STREET NW 800 WASHINGTON,DC 20005		NC	RESEARCH PAPER	25,000
PAPAL FOUNDATION 150 MONUMENT ROAD SUITE 600 BALA CYNWYD,PA 19004		NC	GENERAL OPERATING SUPPORT	25,000
PARENTS ALLIANCE FOR CATHOLIC EDUCATION 14 BEACON STREET 102 BOSTON,MA 02108		NC	RESEARCH PAPER	15,000
PARTNERS IN HEALTH 888 COMMONWEALTH AVENUE 3RD FLOOR BOSTON,MA 02215		NC	GENERAL OPERATING SUPPORT	25,000
PEABODY ESSEX MUSEUM 161 ESSEX STREET SALEM,MA 01970		NC	CAROLYN AND PETER LYNCH EXHIBITION ENDOWMENT	500,000
PHILANTHROPY ROUNDTABLE 1730 M STREET NW 601 WASHINGTON,DC 20036		NC	K-12 EDUCATION PROGRAM	25,000
POPE JOHN PAUL II CATHOLIC ACADEMY 2200 DORCHESTER AVENUE DORCHESTER,MA 02124		NC	EARLY CHILDHOOD PROGRAM	35,629
POSSE FOUNDATION 45 FRANKLIN STREET BOSTON,MA 02110		NC	PROGRAM SUPPORT IN BOSTON	25,000
QUINCY CATHOLIC ACADEMY 370 HANCOCK STREET QUINCY,MA 02171		NC	EARLY CHILDHOOD PROGRAM	27,779
RED SOX FOUNDATION 4 YAWKEY WAY BOSTON,MA 02215		NC	RED SOX SCHOLARS PROGRAM	25,000
RENEW INTERNATIONAL 1232 GEORGE STREET PLAINFIELD,NJ 07062		NC	PROGRAM SUPPORT IN BOSTON	25,000
SACRED HEART SCHOOL 1035 CANTERBURY STREET ROSLINDALE,MA 02131		NC	EARLY CHILDHOOD PROGRAM	65,100
SAINT JOSEPH PREPARATORY HIGH SCHOOL 617 CAMBRIDGE STREET BOSTON,MA 02134		NC	CAPITAL AND PROGRAM EXPANSION	250,000
SOUTH BOSTON CATHOLIC ACADEMY 866 E BROADWAY SOUTH BOSTON,MA 02127		NC	EARLY CHILDHOOD PROGRAM	19,429
ST JOHN SCHOOL 9 MOON STREET BOSTON,MA 02113		NC	EARLY CHILDHOOD PROGRAM	21,429
Total				7,849,826

Form 990PF Part XV Line 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				
ST JOHN THE BAPTIST 19 CHESTNUT STREET PEABODY,MA 01960		NC	LYNCH SCHOLARS	9,876
ST JOHN THE EVANGELIST 111 NEW BALCH STREET BEVERLY,MA 01915		NC	LYNCH SCHOLARS	2,000
ST MARY STAR OF THE SEA SCHOOL 13 CHAPMAN STREET BEVERLY,MA 01915		NC	LYNCH SCHOLARS	4,000
ST ROSE SCHOOL 580 BROADWAY CHELSEA,MA 02150		NC	EARLY CHILDHOOD PROGRAM	13,429
SUMMER SEARCH BOSTON 3840 WASHINGTON STREET BOSTON,MA 02130		NC	PROGRAM SUPPORT IN BOSTON	25,000
TEACH FOR AMERICA 60 CANAL STREET 3RD FLOOR BOSTON,MA 02114		NC	PROGRAM EXPANSION IN BOSTON	100,000
TECH VALLEY HIGH SCHOOL 246 TRICENTENNIAL DRIVE ALBANY,NY 12203		NC	TRIBUTE GIFT	250
THE ACHIEVEMENT NETWORK 225 FRIEND STREET SUITE 704 BOSTON,MA 02114		NC	PROGRAM EXPANSION IN BOSTON	200,000
THE BOSTON FOUNDATION 75 ARLINGTON STREET 1000 BOSTON,MA 02116		NC	GENERAL OPERATING SUPPORT	25,000
THE FUND FOR BIDMC-BOTSWANA 330 BROOKLINE AVENUE BOSTON,MA 02215		NC	GENERAL OPERATING SUPPORT	25,000
THOMAS B FORDHAM INSTITUTE 1016 16TH STREET WASHINGTON,DC 20036		NC	RESEARCH PAPER	50,000
UP EDUCATION NETWORK 90 CANAL STREET 600 BOSTON,MA 02114		NC	SUPPORT IN LAWRENCE PUBLIC SCHOOLS	150,000
URBAN CATHOLIC TEACHER CORPS 25 LAWRENCE AVENUE CHESTNUT HILL,MA 02467		NC	PROGRAM SUPPORT IN BOSTON	50,000
WGBH ONE GUEST STREET BOSTON,MA 02135		NC	BLACK HOLES DOCUMENTARY & NOVA	275,000
WHEELOCK COLLEGE 200 RIVERWAY BOSTON,MA 02215		NC	EARLY CHILDHOOD SCHOLARSHIPS	145,000
Total			3a	7,849,826

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
XAVERIAN BROTHERS HIGH SCHOOL 800 CLAPBOARDTREE STREET WESTWOOD,MA 02090		NC	CAPITAL CAMPAIGN	50,000
YEAR UP BOSTON 45 MILK STREET BOSTON,MA 02109		NC	PROGRAM EXPANSION IN BOSTON	250,000
Total			 3a	7,849,826

TY 2015 Accounting Fees Schedule

Name: THE LYNCH FOUNDATION

EIN: 04-3017940

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	43,236	0		43,566

TY 2015 Investments Corporate Stock Schedule

Name: THE LYNCH FOUNDATION

EIN: 04-3017940

Name of Stock	End of Year Book Value	End of Year Fair Market Value
PUBLICLY TRADED SECURITIES	107,696,518	107,696,518

TY 2015 Investments - Other Schedule

Name: THE LYNCH FOUNDATION

EIN: 04-3017940

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
PRIVATE EQUITY INVESTMENTS	FMV	3,558,667	3,558,667

TY 2015 Other Decreases Schedule

Name: THE LYNCH FOUNDATION

EIN: 04-3017940

Description	Amount
UNREALIZED LOSS ON INVESTMENTS	12,162,489

TY 2015 Other Expenses Schedule**Name:** THE LYNCH FOUNDATION**EIN:** 04-3017940

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MISCELLANEOUS EXPENSE	2,186	0		2,186
MEMBERSHIP	7,662	0		7,396
OFFICE EXPENSES	75,011	0		64,944
EVENTS	46,607	0		46,607
FEDERAL EXCISE TAX BENEFIT	-190,774	0		0

TY 2015 Other Liabilities Schedule**Name:** THE LYNCH FOUNDATION**EIN:** 04-3017940

Description	Beginning of Year - Book Value	End of Year - Book Value
DEFERRED EXCISE TAX	306,005	62,755
ACCRUED FEDERAL EXCISE TAX	7,099	0

TY 2015 Other Professional Fees Schedule**Name:** THE LYNCH FOUNDATION**EIN:** 04-3017940

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	612,404	612,404		0
SOFTWARE	113	0		88
OTHER CONSULTANTS	17,968	0		8,568

TY 2015 Substantial Contributors
Schedule

Name: THE LYNCH FOUNDATION

EIN: 04-3017940

Name	Address
PETER CAROLYN LYNCH	30 ROWES WHARF SUITE 600 BOSTON,MA 02110

TY 2015 Taxes Schedule**Name:** THE LYNCH FOUNDATION**EIN:** 04-3017940

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	1,463	1,463		0
PAYROLL TAXES	32,188	7,097		32,188

<div>Schedule B</div> <div>(Form 990, 990-EZ, or 990-PF)</div> <div>Department of the Treasury Internal Revenue Service</div>	<div>Schedule of Contributors</div> <div>▶ Attach to Form 990, 990-EZ, or 990-PF.</div> <div>▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.</div>	<div>OMB No 1545-0047</div> <div>2015</div>
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<div>Name of the organization</div> <div>THE LYNCH FOUNDATION</div>	<div>Employer identification number</div> <div>04-3017940</div>
---	---

Organization type (check one)

<div>Filers of:</div> <div>Form 990 or 990-EZ</div> <div>Form 990-PF</div>	<div>Section:</div> <div><div><input type="checkbox"/> 501(c)() (enter number) organization</div><div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust not treated as a private foundation</div><div><input type="checkbox"/> 527 political organization</div><div><input checked="" type="checkbox"/> 501(c)(3) exempt private foundation</div><div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation</div><div><input type="checkbox"/> 501(c)(3) taxable private foundation</div></div>
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Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor Complete Parts I and II See instructions for determining a contributor's total contributions

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc , purposes, but no such contributions totaled more than \$1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions totaling \$5,000 or more during the year ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer “No” on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization THE LYNCH FOUNDATION	Employer identification number 04-3017940
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Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	CAROLYN LYNCH	\$ 8,207,126	Person <input type="checkbox"/>
	30 ROWES WHARF SUITE 600		Payroll <input type="checkbox"/>
	BOSTON, MA 02110		Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization THE LYNCH FOUNDATION	Employer identification number 04-3017940
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Part II

Noncash Property
(see instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	STOCK	\$ 8,207,126	2015-12-29
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

Name of organization THE LYNCH FOUNDATION	Employer identification number 04-3017940
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Part III

Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$ _____

Use duplicate copies of Part III if additional space is needed

(a) No.from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	--		
(a) No.from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	--		
(a) No.from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	--		
(a) No.from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
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