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## Form **990-PF**

#### **Return of Private Foundation**

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

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

OMB No 1545-0052

Department of the Treasury Internal Revenue Service

▶ Information about Form 990-PF and its separate instructions is at <a href="https://www.irs.gov/form990pf">www.irs.gov/form990pf</a>

For calendar year 2015 or tax year beginning		, and ending		
Name of foundation			A Employer identification	number
THE NADUSE FOUNDATION				
(FKA THE POLARIS FOUNDATION	N)		04-3342883	
Number and street (or P O box number if mail is not delivered to street a	ddress)	Room/suite	B Telephone number	
ATTN: F. DANBY LACKEY, III	PO BOX 1038		617-451-68	64
City or town, state or province, country, and ZIP or foreign p	ostal code		C If exemption application is pe	ending, check here
GROTON, MA 01450				
G Check all that apply: Initial return	Initial return of a fo	rmer public charity	D 1. Foreign organizations	, check here
Final return	Amended return	•		
Address change	Name change		<ol><li>Foreign organizations med check here and attach cor</li></ol>	eting the 85% test,
H Check type of organization: X Section 501(c)(3) ex			E If private foundation stat	
	Other taxable private foundat	tion	under section 507(b)(1)	
· · · · · · · · · · · · · · · · · · ·	ng method: X Cash	Accrual		
· \	ther (specify)		F If the foundation is in a ( under section 507(b)(1)	
►\$ 950,118. (Part I, colu		asis )		(D), GIIOOK IIGIO
Part 1 Analysis of Revenue and Expenses	(a) Revenue and	(b) Net investment	(c) Adjusted net	(d) Disbursements
(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) )	expenses per books	income	income	for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received	4,709.	*	N/A	12. 2
2 Check X if the foundation is not required to attach Sch B	1,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	<u></u>		.> %
Interest on savings and temporary	-		· · · · · · · · · · · · · · · · · · ·	, , , , ,
desh investments     Dividends and interest from securities	19,023.	19,023.		STATEMENT 1
5a Gross rents	15,025.	13,023		7 ** 2 ,
6 5a Gross rents		, ÷····		
b Net rental income or (loss)	20,006.	<del> </del>	· · ·	
b Net rental income or (loss)  6a Net gain or (loss) from sale of assets not on line 10 b Gross sales price for all 32,540.  7 Capital gain net income (from Part IV, line 2)  8 Net short-term capital gain	20,000.	· · · · · · · · · · · · · · · · · · ·		376
assets on line 6a	29,	20,006.		RECEIVED
7 Capital gain net income (from Part IV, line 2)	. 4 %	20,000.	2	9
o wat anort term applied gain	, , , , ,		<u>                                   </u>	WAY 25 2016 19
9 Income modifications Gross sales less returns 10a and allowances	* · · · · · · · · · · · · · · · · · · ·	% 'x ,		20 Z010
1 .	<i>→</i> <u>*</u>	#, #, , , ,	\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\	
b Less Cost of goods sold	* * **			GDEN, UT
c Gross profit or (loss)		*		· · · ·
11 Other income 12 Total Add lines 1 through 11	43,738.	39,029.		
~ 0	0.	0.		0.
<ul><li>13 Compensation of officers, directors, trustees, etc</li><li>14 Other employee salaries and wages</li></ul>				
			<del> </del>	
1	<b>-</b>			
b Accounting fees STMT 2	4,500.	0.		4,500.
b Accounting fees c Other professional fees STMT 2 STMT 3	200.	200.	<u> </u>	0.
	200.	2001		<b>.</b>
17 Interest 18 Taxes STMT 4 19 Depreciation and depletion 20 Occupancy	422.	213.		35.
19 Depreciation and depletion	722.	213.		† · · · · · · · · · · · · · · · · · · ·
19 Depreciation and depletion				
7-1				
1				
22 Printing and publications	<del></del>	<del> </del>		
23 Other expenses				
24 Total operating and administrative expenses. Add lines 13 through 23	5,122.	413.		4,535.
	37,000.			37,000.
25 Continuations, giras, grains paid	37,000.		· · · · · · · · · · · · · · · · · · ·	3.,000.
26 Total expenses and disbursements	42,122.	413.		41,535.
Add lines 24 and 25	20,144.			21,555
27 Subtract line 26 from line 12:	1,616.			
Excess of revenue over expenses and disbursements     Net investment income (dispursements)	1,010.	38,616.		
b Net investment income (If negative, enter -0-)	<del></del>	30,010.	N/A	1
c Adjusted net income (if negative, enter -0-)	<u></u>			

Form 990-PF (2015)

(FKA THE POLARIS FOUNDATION)

Б	art	Balance Sheets Attached schedules and amounts in the description	Beginning of year	End o	<del></del>
	ar c	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing	227,364.	211,180.	211,180.
	2	Savings and temporary cash investments			
	3	Accounts receivable	•		, ;
		Less; allowance for doubtful accounts ▶			
	4	Pledges receivable	·	24	,
		Less: allowance for doubtful accounts ▶	<del>-</del>		
	5	Grants receivable			
	_	Receivables due from officers, directors, trustees, and other			
i	6	·			
	١ ـ	disqualified persons		** * * * * * * * * * * * * * * * * * *	3', , k
	7	Other notes and loans receivable	176.00	3 * 10 4	***
		Less: allowance for doubtful accounts			
ţ	_	Inventories for sale or use			
Assets		Prepaid expenses and deferred charges			
٧	10a	Investments - U.S. and state government obligations			
	b	Investments - corporate stock STMT 5	386,249.	404,216.	738,938.
	c	Investments - corporate bonds			
	11	Investments land, buildings, and equipment basis			
	l	Less accumulated depreciation			
	12	Investments - mortgage loans			
	13	Investments - other		·	
	14	Land, buildings, and equipment; basis	7	Α.Α., . 4»	, ;-, v (%)
	` `	Less accumulated depreciation			
	15	Other assets (describe		· · · · · · · · · · · · · · · · · · ·	
	1	Total assets (to be completed by all filers - see the			
	'	Instructions. Also, see page 1, item I)	613,613.	615,396.	950,118.
	17	Accounts payable and accrued expenses	020/0200	<u> </u>	1 1 2 2 3 1
	18	Grants payable	-		·
	1	Deferred revenue			
ies	19				
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
Ē	21	Mortgages and other notes payable			
	22	Other liabilities (describe )		· · · · · · · · · · · · · · · · · · ·	
	l		0.	0.	
_	23	Total liabilities (add lines 17 through 22)	0.	0.	
		Foundations that follow SFAS 117, check here	İ		
	l	and complete lines 24 through 26 and lines 30 and 31.			, , , , , , , , , , , , , , , , , , ,
Ses	24	Unrestricted			
<u>a</u>	25	Temporarily restricted			
Ва	26	Permanently restricted		<u> </u>	
ā	ļ	Foundations that do not follow SFAS 117, check here			
ī		and complete lines 27 through 31.			
õ	27	Capital stock, trust principal, or current funds	613,613.	615,396.	
Net Assets or Fund Balances	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
Ass	29	Retained earnings, accumulated income, endowment, or other funds	0.	0.	
<u>e</u>	30	Total net assets or fund balances	613,613.	615,396.	
~					
	31	Total liabilities and net assets/fund balances	613,613.	615,396.	
Ξ					
LP	art	Analysis of Changes in Net Assets or Fund Ba	alances		
<del>-</del>	Tota	I net assets or fund balances at beginning of year - Part II, column (a), line	30		
•		st agree with end-of-year figure reported on prior year's return)	<del></del>	1	613,613.
2	•	r amount from Part I, line 27a		2	1,616.
		er increases not included in line 2 (itemize)  ADJUSTMENT  ADJUSTMENT		3	167.
		lines 1, 2, and 3		4	615,396.
		reases not included in line 2 (itemize)		5	0.
		I net assets or fund balances at end of year (line 4 minus line 5) - Part II. c	olumn (h) line 30	6	615,396.
0	111111111111111111111111111111111111111	i nei gaaeta vi tunu ugigneea gi CHU VI VGgi tilille 4 IIIIIUS IIIIG 31 ° Edit II. U	OLDITHI LUZ. IIIIG UV	1 0	/

Form 990-PF (2015) (FKA THE POLARIS FOUNDATION)

Pa	rt IV	Capital Gains a	and Los	sses for Tax on Inv	/estment	Income						
		(a) List and desci 2-story brick wa	ribe the kir irehouse; d	nd(s) of property sold (e.g., or common stock, 200 shs.	, real estate, MLC Co.)		( <b>b)</b>	How ac - Purch - Dona	quired hase ition	(c) Date a (mo., da		(d) Date sold (mo., day, yr.)
1a	299.6	76 MEDTROI	VIC I	NC COM					P	09/2	4/97	01/27/15
b	.351	MEDTRONIC	INC	COM					P	11/0		01/27/15
		MEDTRONIC							P	02/0		01/27/15
		6 MEDTRON							P	09/1	1/07	01/27/15
<u>e</u> (	CAPIT	TAL GAINS I	DIVID	ENDS			<u> </u>					
	(e) Gro	oss sales price	(f) [	Depreciation allowed (or allowable)		t or other basis xpense of sale					ain or (loss (f) minus	(g)
a		23,060.				7,04						16,019.
<u>b</u>		27.					8.					19.
<u> </u>		23.					8.					15.
<u>d</u>		7,670.				5,47	7.					2,193.
<u>e</u>		1,760.										1,760.
	Complete	only for assets showing		column (h) and owned by t							ol. (h) gaın ıot less thaı	
	(i) F.M.V	. as of 12/31/69	(	j) Adjusted basis as of 12/31/69		cess of col. (1) col. (j), if any			COI		(from col. (	h))
<u>a</u>												16,019.
_b_						<del></del>						19.
<u> </u>												15.
<u>d</u>											_	2,193.
<u>e</u>												1,760.
<b>2</b> C	apıtal gaır	n net income or (net ca	ıpıtal loss)	If gain, also enter If (loss), enter -0-			}	2				20,006.
3 N	let short-te	erm capital gain or (los	ss) as defii	ned in sections 1222(5) and	d (6):				ı			
		enter in Part I, line 8,			` '							
	(loss), en	ter -0- in Part I, line 8	-dC	ection 4940(e) for	Dadwaad	Toy on Not	ال	3			N/A	
										ille		
(For	optional u	se by domestic private	e foundation	ons subject to the section 4	940(a) tax on	net investment in	come	.)				
If sec	ction 4940	)(d)(2) applies, leave tl	his part bla	ank.								
						the been now						Yes X No
				tax on the distributable am		•	1007					Yes _A_ NO
				section 4940(e). Do not cor nn for each year; see the in			ntries			•		
<u>-</u> -	-iitei tiie a	(a)	Cacin Coldi		30 0000013 001	ore making any or						(d)
۲,		Base periód years ar (or tax year beginni	חמיוט)	(b) Adjusted qualifying dist	tributions	Net value of no	(c) oncha		use assets			oùtión ratio vided by col. (c))
	aleliual ye	2014	iig iii)		7,326.			97	0,925		(0011 (12) (11)	.048743
		2013			9,900.				3,926			.043658
		2012			1,700.				1,398			.026101
		2011			9,235.				7,232			.057435
	-	2010			9,559.				1,953		-,	.058862
			<u> </u>									<del></del>
2 T	otal of lin	e 1, column (d)								2		.234799
			5-year bas	se period - divide the total o	on line 2 by 5,	or by the number	of ye	ars				
	_	tion has been in existe	-		• .	·	•			3		.046960
				•								
4 E	nter the n	et value of noncharitat	ole-use ass	sets for 2015 from Part X, I	ine 5					4		942,124.
5 N	Multiply lin	ie 4 by line 3								5		44,242.
6 E	nter 1% o	of net investment incon	ne (1% of	Part I, line 27b)						6		386.
7 A	Add lines 5	and 6								7		44,628.
			m Doet VII	luna 4						8		41,535.
	· •	fying distributions from		line 4 neck the box in Part VI, line	1h and comp	lete that nart usin	າຕ ລ 1	% tay r	ate	<u>8</u>	1	41,000.
		rt VI instructions.	ii iiii6 /, Gl	IOON LIIG DON III FAIL VI, IIIIB	io, and comp	note that part usin	·y a I	⁄υ ια∧ Ι	410.			

THE NADUSE FOUNDATION (FKA THE POLARIS FOUNDATION) Page 4 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 and enter "N/A" on line 1. Date of ruling or determination letter: (attach copy of letter if necessary-see instructions) 772. b Domestic foundations that meet the section 4940(e) requirements in Part V, check here 

and enter 1% 1 of Part I, line 27b c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b). 0. 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 772. 3 Ó Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 772 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-5 6 Credits/Payments: a 2015 estimated tax payments and 2014 overpayment credited to 2015 b Exempt foreign organizations - tax withheld at source 6b c Tax paid with application for extension of time to file (Form 8868) 6c 6d d Backup withholding erroneously withheld 0 7 Total credits and payments. Add lines 6a through 6d Enter any penalty for underpayment of estimated tax. Check here X if Form 2220 is attached 4. 8 776. 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Enter the amount of line 10 to be: Credited to 2016 estimated tax Refunded > Part VII-A | Statements Regarding Activities No Yes 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in Х any political campaign? 1a b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? 1b X If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities X c Did the foundation file Form 1120-POL for this year? 1c d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. > \$ 0 • (2) On foundation managers. ► \$ e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. > \$ X 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? 2 If "Yes," attach a detailed description of the activities 3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or X 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? 4a N/A b If "Yes," has it filed a tax return on Form 990-T for this year? 4b X 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 5 If "Yes," attach the statement required by General Instruction T. ţ. 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 X remain in the governing instrument?

7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV

Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar

b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate)

year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? If "Yes," complete Part XIV 10 Did any persons become substantial contributors during the tax year? It "Yes," attach a schedule listing their names and addresses

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

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

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X

X

8b

(FKA THE POLARIS FOUNDATION)

orm	990-PF (2015) (FKA THE POLARIS FOUNDATION) 04-334	<u> 2883</u>		Page 5
Pa	rt VII-A   Statements Regarding Activities (continued)			
			Yes	No
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?	13	Х	
	Website address ► N/A			
14	The books are in care of ▶ F. DANBY LACKEY, III Telephone no. ▶ 617-4	51-6	864	
• •	Located at ▶ P.O. BOX 1038, GROTON, MA ZIP+4 ▶0			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here		_	$\overline{\Box}$
	and enter the amount of tax-exempt interest received or accrued during the year	N	/A	
16	At any time during calendar year 2015, did the foundation have an interest in or a signature or other authority over a bank,		Yes	No
	securities, or other financial account in a foreign country?	16	"	X
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the	'''	L	
	foreign country			*
Pa	ort VII-B   Statements Regarding Activities for Which Form 4720 May Be Required			
			Yes	No
1.	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.  During the year did the foundation (either directly or indirectly):		1.53	
ıa		1		
		1		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  Yes X No	1		
	(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)?  Yes X No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No"	İ		
	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.)  Yes X 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		<del> </del>	
	section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here			,
C	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected			]
_	before the first day of the tax year beginning in 2015?	1c	3	X 2.568
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation	1,,,	7. 16	2.25
	defined in section 4942(j)(3) or 4942(j)(5)):	٠.	ų .	- 3 <sub>1</sub>
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		,	44 m
	before 2015? Yes X No			·
	If "Yes," list the years , , , , , , , , , , , , , , , , , , ,		l	
b	Are there any years listed in 2a for which the foundation is <b>not</b> 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	<u> </u>	-	
	statement - see instructions.) N/A	2b	<b>├</b> ─	
C	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here.			
	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
38			1	
	during the year?			
t	of "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? (Use Schedule C,		<u> </u>	
	Form 4720, to determine if the foundation had excess business holdings in 2015.)  N/A	3b	ļ	<u> </u>
48	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
t	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that	<u> </u>	<u> </u>	
	had not been removed from jeopardy before the first day of the tax year beginning in 2015?	4b	<u> </u>	X
	F	orm <b>99</b>	0-PF	(2015)

THE NADUSE FOUNDATION (FKA THE POLARIS FOUNDATION) 'Form 990-PF (2015) 04-3342883 Page 6 Part VII-B | Statements Regarding Activities for Which Form 4720 May Be Required (continued) 5a During the year did the foundation pay or incur any amount to: Yes X No (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, \$ Yes X No any voter registration drive? Yes X No (3) Provide a grant to an individual for travel, study, or other similar purposes? š. 'n. (4) Provide a grant to an organization other than a charitable, etc., organization described in section Yes X No 4945(d)(4)(A)? (see instructions) (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for Yes X No the prevention of cruelty to children or animals? b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations N/A 5b section 53.4945 or in a current notice regarding disaster assistance (see instructions)? ,- <sub>4</sub>45 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 N/A Yes expenditure responsibility for the grant? Š If "Yes," attach the statement required by Regulations section 53 4945-5(d) 6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on Yes X No a personal benefit contract? X b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 6b . \*\* If "Yes" to 6b, file Form 8870. Yes X No 7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? N/A 7b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors 1 List all officers, directors, trustees, foundation managers and their compensation. (c) Compensation (d) Contributions to employee benefit plans and deferred compensation (b) Title, and average hours per week devoted to position (e) Expense account, other (If not paid, enter -0-) (a) Name and address allowances 0. 0 0. SEE STATEMENT 6 2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE." (d) Contributions to employee benefit plans and deferred compensation (b) Title, and average (e) Expense account, other (c) Compensation (a) Name and address of each employee paid more than \$50,000 hours per week devoted to position allowances NONE

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

#### THE NADUSE FOUNDATION

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Part VIII: Information About Officers, Directors, Trustees, Founda Paid Employees, and Contractors (continued)	tion Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, enter	r "NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
	_	
Table to the second sec		▶ 0
Total number of others receiving over \$50,000 for professional services  Part IX-A   Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include relevant stati- number of organizations and other beneficiaries served, conferences convened, research papers pro-	stical information such as the duced, etc.	Expenses
1 N/A		
2		
3		
Δ		
Part IX:B   Summary of Program-Related Investments  Describe the two largest program-related investments made by the foundation during the tax year or	lines 1 and 2	Amount
1 N/A	Times Tanu Z.	Allount
-17		
2		
		•
All other program-related investments. See instructions.		
		]
Total. Add lines 1 through 3		0.

	m 990-PF (2015) (FKA THE POLARIS FOUNDATION)	04-3342883	Page 8
P	Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndations, see instructions)	
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes;		<del></del>
·	Average monthly fair market value of securities	1a 749	,743.
	Average of monthly cash balances	1b 206	,728.
_	Fair market value of all other assets	1c	·
d		1d 956	,471.
_	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		,471.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4 14	,347.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4		,124.
6	Minimum investment return Enter 5% of line 5		,106.
ĬΡ	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations an		<del></del>
<b></b>	foreign organizations check here  and do not complete this part.)		
1	Minimum investment return from Part X, line 6	1 47	,106.
2 a	Tax on investment income for 2015 from Part VI, line 5	*	
ь	Income tax for 2015. (This does not include the tax from Part VI.)	l <u>.</u>	
C	Add lines 2a and 2b	2c	772.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3 46	,334.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5 46	,334.
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		,334.
_	ari VIII	<u> </u>	
	Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:	\$ *	
·a	5		,535.
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:	^,	
-	Suitability test (prior IRS approval required)	3a	
b		3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4		,535.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		-

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

Form **990-PF** (2015)

income. Enter 1% of Part I, line 27b

Adjusted qualifying distributions. Subtract line 5 from line 4

4940(e) reduction of tax in those years.

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# THE NADUSE FOUNDATION (FKA THE POLARIS FOUNDATION)

Part XIII Undistributed Income (see instructions)

a Excess from 2011 6,656. b Excess from 2012 c Excess from 2013			(a) Corpus	(b) Years prior to 2014	( <b>c</b> ) 2014	( <b>d)</b> 2015
2 Undestributions carryover, if any, to 2015: a From 2010	1					46 334
Enter amount for 2014 only  Total for prior years:  2 Excess distributions carryover, if any, to 2015:  a From 2010  6	2					
\$ Excess distributions carryover, if any, to 2015: a From 2010		-	· •		<u> </u>	, , ,
3 Excess distributions carryover, if any, to 2015: a From 2010		-				
3 Excess distributions carryover, if any, to 2015: a From 2010	U	Total for prior years.	,	0	**	ž.
From 2010	•	Excess distributions carryover if any to 2015:		, ,		<del></del>
e From 2013 e From 2014 f Total of lines & through e  1 0 Loughtying distributions for 2015 from Part XII, line 4; ▶ \$ 41,535. a Applied to 2014, but not more than line 2a b Applied to undistributed income of prior years (Election required - see instructions) (Election required - see instructions) (Election required - see instructions) (Election required - see instructions) d Applied to 2015 distributable amount e Remaining amount distributed out of corpus (Election required - see instructions)  5 Excess distributions out of corpus (Election required - see instructions) d Applied to 2015 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions early owe speles to 2015 for an emotification in ordining light at least an emotification of the corpus of the section 49(2) at large time and a from line 2 b  Eater the net total region of the corpus of the section 49(2) at large time and the corpus of the section 49(2) at large time and the section 49(2) at large time and the section 49(2) at large time and the section 49(2) at large time and the section 49(2) at large time and the section 49(2) at large time and the section 49(2) at large time and the section 49(2) at large time and the section 49(2) at large time and the section 49(2) at large time and the section 49(2) at large time and the section 49(2) at large time and the section 49(2) at large time and the section 49(2) at large time and the section 49(2) at large time and the section 49(2) at large time and the section 49(2) at large time and the section 49(2) at large time and time and the section 49(2) at large time and						\$ v
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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 2014. Subtract line 4a from line 2a. Taxable amount - see instr.  f Undistributed income for 2015. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2016  7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(f) or 4942(a)(3) (Election may be required - see instructions)  8 Excess distributions carryover from 2010 not applied on line 5 or line 7  9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a  10 Analysis of line 9:  a Excess from 2011 6, 656. b Excess from 2012 c Excess from 2013	t				8 *	
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 2014. Subtract line 4a from line 2a. Taxable amount - see instr.  1 Undistributed income for 2015. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2016  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 2010 not applied on line 5 or line 7  9 Excess fistributions carryover to 2016. Subtract lines 7 and 8 from line 6a  10 Analysis of line 9:  a Excess from 2011  b Excess from 2012  c Excess from 2013		line 4b from line 2b		0.	*	
amount - see instructions e Undistributed income for 2014. Subtract line 4a from line 2a. Taxable amount - see instr. f Undistributed income for 2015. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2016  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 2010 not applied on line 5 or line 7  9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a  10 Analysis of line 9: a Excess from 2011 b Excess from 2012 c Excess from 2013	(	undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously	, , , ,	0.	*	
amount - see instructions e Undistributed income for 2014. Subtract line 4a from line 2a. Taxable amount - see instr. f Undistributed income for 2015. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2016  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 2010 not applied on line 5 or line 7  9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a  10 Analysis of line 9: a Excess from 2011 b Excess from 2012 c Excess from 2013		d Subtract line 6c from line 6b. Taxable				·
e Undistributed income for 2014. Subtract line 4a from line 2a. Taxable amount - see instr.  f Undistributed income for 2015. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2016  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 2010 not applied on line 5 or line 7  9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a  10 Analysis of line 9: a Excess from 2011 b Excess from 2012 c Excess from 2013	Ì		*	0.		· · · · · · · · · · · · · · · · · · ·
4a from line 2a. Taxable amount - see instr.  f Undistributed income for 2015. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2016  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 2010 not applied on line 5 or line 7  9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a  10 Analysis of line 9: a Excess from 2011 6,656. b Excess from 2012 c Excess from 2013						>>
f Undistributed income for 2015. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2016  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 2010 not applied on line 5 or line 7  9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a  10 Analysis of line 9:  a Excess from 2011	•		,	:	٥.	
lines 4d and 5 from line 1. This amount must be distributed in 2016  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 2010 not applied on line 5 or line 7  9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a  10 Analysis of line 9:  a Excess from 2011 6,656. b Excess from 2012 c Excess from 2013						
be distributed in 2016  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 2010 not applied on line 5 or line 7 2, 072.  9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a  10 Analysis of line 9: a Excess from 2011 6, 656. b Excess from 2012 Excess from 2013	•					
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 2010 not applied on line 5 or line 7  9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a  10 Analysis of line 9: a Excess from 2011 b Excess from 2012 c Excess from 2013						n
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 2010 not applied on line 5 or line 7  9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a  Analysis of line 9: a Excess from 2011 b Excess from 2012 c Excess from 2013	-					
section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)  8 Excess distributions carryover from 2010 not applied on line 5 or line 7  9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a  10 Analysis of line 9: a Excess from 2011 b Excess from 2012 c Excess from 2013	1					
may be required - see instructions)  8 Excess distributions carryover from 2010 not applied on line 5 or line 7  9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a  10 Analysis of line 9: a Excess from 2011 b Excess from 2012 c Excess from 2013						
8 Excess distributions carryover from 2010 not applied on line 5 or line 7  9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a  10 Analysis of line 9: a Excess from 2011 b Excess from 2012 c Excess from 2013			0			
not applied on line 5 or line 7  9 Excess distributions carryover to 2016.  Subtract lines 7 and 8 from line 6a  10 Analysis of line 9:  a Excess from 2011  b Excess from 2012  c Excess from 2013	_		<b>U</b> •			
9 Excess distributions carryover to 2016.  Subtract lines 7 and 8 from line 6a  10 Analysis of line 9:  a Excess from 2011	8	· ·	0 050			
Subtract lines 7 and 8 from line 6a  10 Analysis of line 9:  a Excess from 2011  b Excess from 2012  c Excess from 2013		[	2,072.			
10 Analysis of line 9:  a Excess from 2011	9	_	<b>.</b>			
a Excess from 2011 6,656. b Excess from 2012 c Excess from 2013		Subtract lines 7 and 8 from line 6a	6,656.			
b Excess from 2012 c Excess from 2013	10					
c Excess from 2013		a Excess from 2011 6,656.				
	ı	Excess from 2012			1	
d Excess from 2014	(	c Excess from 2013	'			
1 LACCOSS   10   1   20   1   1   1   1   1   1   1   1   1	(	d Excess from 2014	,			
e Excess from 2015						

THE NADUSE FOUNDATION

orm 990-PF (2015)	(FKA THE	POLARIS FO	OUNDATION)		04-33	12883 Page 10
Part XIV   Private	Operating Fou	ndations (see ins	tructions and Part VII	A, question 9)	N/A	
1 a If the foundation has r	eceived a ruling or de	etermination letter that	it is a private operating			
foundation, and the ru	ling is effective for 20	015, enter the date of the	ne ruling	▶		<del></del>
<b>b</b> Check box to indicate	whether the foundate	on is a private operatin	g foundation described i	n section	4942(j)(3) or 49	12(j)(5)
2 a Enter the lesser of the	adjusted net	Tax year		Prior 3 years		
income from Part I or	the minimum	(a) 2015	( <b>b</b> ) 2014	(c) 2013	(d) 2012	(e) Total
investment return fron	n Part X for					
each year listed						
<b>b</b> 85% of line 2a						
c Qualifying distribution	s from Part XII,					
line 4 for each year lis	ted					
d Amounts included in I	ine 2c not					
used directly for active	e conduct of					
exempt activities						_
e Qualifying distribution	s made directly					
for active conduct of e	•			1		
Subtract line 2d from	·					
3 Complete 3a, b, or c fe	or the					
alternative test relied i						
(1) Value of all assets				ł		
• •			· ·-			
(2) Value of assets q under section 49						
b "Endowment" alternati						
2/3 of minimum inves	tment return					
shown in Part X, line (	6 for each year					
c "Support" alternative to	est - enter*					
(1) Total support oth						
investment incon	•					
dividends, rents,						
securities loans (						
512(a)(5)), or roy (2) Support from get						<del></del>
and 5 or more ex						
organizations as						
section 4942(j)(3 (3) Largest amount of						
	· · · · I					
an exempt organ (4) Gross investmen				<del></del>		
Part XV   Suppler	nentary inform	nation (Complet	te this part only i	f the foundation	had \$5,000 or mor	e in assets
		year-see instri				
1 Information Regar	<del></del>		<u>-</u>			
			than 2% of the total cont	ributions received by the	foundation before the close	e of any tax
		e than \$5,000). (See so		noonono room oo oy ma		or any tax
F. DANBY LAC			, ,			
		own 10% or more of the	e stock of a corporation	or an equally large porti	on of the ownership of a pa	rtnership or
		10% or greater interes		, or an equality and graph and		
NONE						
<del></del>	rding Contribution	. Grant. Gift. Loan.	Scholarship, etc., Pr	ograms:	· · · · · · · · · · · · · · · · · · ·	
					not accept unsolicited reque	sts for funds. If
					omplete items 2a, b, c, and	
a The name, address, a	nd telephone number	or e-mail address of the	he person to whom apple	cations should be addre	ssed:	
5			,			
b The form in which ap	plications should be	submitted and informat	tion and materials they s	hould include;		
			<u> </u>			
c Any submission dead	llines:					
				<del></del>		
d Any restrictions or lin	nitations on awards,	such as by geographica	al areas, charitable fields	kinds of institutions, or	other factors:	

(FKA THE POLARIS FOUNDATION)

Supplementary Information (continued) Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Recipient Purpose of grant or contribution Foundation show any relationship to Amount status of any foundation manager Name and address (home or business) recipient or substantial contributor a Paid during the year CHEWONKI FOUNDATION NONE 501 (C) (3) GENERAL WELFARE 5,000. FRIENDS OF CAMP HALE NONE 501 (C) (3) GENERAL WELFARE 5,000. NONE 501 (C) (3) GENERAL WELFARE MASS ART FOUNDATION INC 1,500. NONE GENERAL WELFARE MASS AUDUBON SOCIETY 501 (C) (3) 1,500. NONE 501 (C) (3) GENERAL WELFARE ON THE RISE 4,000. SEE CONTINUATION SHEET(S) **▶** 3a 37,000. Total **b** Approved for future payment NONE **▶** 3b 0. Total

#### Part XVI-A **Analysis of Income-Producing Activities**

Enter gross amounts unless otherwise indicated.	Unrelate	ed business income		ded by section 512, 513, or 514	(e)
	(a) Business	(b)	(C) Exclu-	(d)	Related or exempt
1 Program service revenue:	Business	Amount	sion	Amount	function income
•		=	<b></b>		
			<del>                                     </del>		
<u> </u>			<del>                                     </del>		<del></del>
0	-				
e			-		
·			-		
g Fees and contracts from government agencies				<u> </u>	<del></del>
2 Membership dues and assessments					
3 Interest on savings and temporary cash					
investments			4.4	10.00	
4 Dividends and interest from securities			14	19,023.	78 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
5 Net rental income or (loss) from real estate:	, ,			* 1 1 1 1 1 1 1 1	, E , ' + , + ,
a Debt-financed property					
b Not debt-financed property			<u> </u>		
6 Net rental income or (loss) from personal			1		
property					
7 Other investment income					
8 Gain or (loss) from sales of assets other					
than inventory			18	1,760.	18,246.
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
	1				
a			<del> </del>		
			<del> </del>		
C			<del>  -</del>		
d			<del>                                     </del>	· · · · · · · · · · · · · · · · · · ·	
40 Cubtotal Add columns (b) (d) and (e)	, , <u>\$</u>	0.	*	20,783.	18,246.
12 Subtotal. Add columns (b), (d), and (e)		<u> </u>	1 -	13_	
13 Total Add line 12, columns (b), (d), and (e)				13_	33,023.
(See worksheet in line 13 instructions to verify calculations.)					
Part XVI-B Relationship of Activities to	the Acco	emplishment of Exe	empt	Purposes	
Line No. Explain below how each activity for which incor	ma in reported	un column (a) of Part V/I A	contril	outed importantly to the secon	nolichment of
Explain below how each activity for which income the foundation's exempt purposes (other than to			Contra	outed importantly to the accom	ipiisiiiieiit oi
the foundation's exempt purposes (other than t	by providing in	ilds for such purposes).			<del></del>
		·			
<del></del>					<del></del>
				<del></del>	
		<del></del>			
				·	
	_				
				<del></del>	
					·
				<del></del>	

Form 990-PF (2015) Part XVII

(FKA THE POLARIS FOUNDATION) Information Regarding Transfers To and Transactions and Relationships With Noncharitable

		Exempt Organi	izations							
1	Did the or	ganization directly or indir	ectly engage in any o	f the following	with any other organizatio	n described in sectio	n 501(c) of		Yes	No
	the Code (	other than section 501(c)	(3) organizations) or i	ın section 527	, relating to political organi	zations?			\$.'\ \$.'\	A**
a	Transfers	from the reporting founda	ition to a noncharitabl	e exempt orga	anization of:			, ,	Å.	Track .
	(1) Cash							1a(1)		X
	(2) Other	assets						1a(2)		X
b	Other tran	sactions;							š.	
		of assets to a noncharitat	· -					1b(1)		X
	(2) Purch	ases of assets from a nor	ncharitable exempt or	ganization				1b(2)		X
	• •	l of facilities, equipment, i	or other assets					1b(3)		X
	(4) Reim	bursement arrangements						1b(4)	<u> </u>	<u>X</u>
	• •	s or loan guarantees						1b(5)		X
		rmance of services or mei	•	-				1b(6)		X
	-	f facilities, equipment, mai						1c_	<u> </u>	
d					lule. Column (b) should alv				ets,	
		•			d less than fair market valui	e in any transaction t	or snaring arrangement, s	low in		
۵۱.		(b) Amount involved			exempt organization	(d) Description	of transfers, transactions, and	harina arr	20.00000	
a)L	ine no	(b) Amount involved	(c) Name on	N/A	exempt or gamzanom	(u) Description	or transfers, transactions, and s	snæring æri	angemei	113
				N/A		<del> </del>				
				<del></del>						
-		<del></del>								
						· · · · · · · · · · · · · · · · · · ·				
						<u> </u>				
				•		<u> </u>				
						<del></del>				
								-0		
2a		·			or more tax-exempt organi	zations described	Г		ΓŒ	□No
		501(c) of the Code (other		3)) or in secti	on 527?		L	Yes	LA	
b	If "Yes," co	omplete the following sch			(h) Type of organization	1 /	c) Description of relations	hin		
		(a) Name of org	janization		(b) Type of organization	<del>                                     </del>	of Description of relations			
		IV/A						_		
	<del>-</del>									
	<del>-</del>		<del> </del>		<del></del>					
					accompanying schedules and st			y the IRS	discuss	his
	gn	elief, it is true, correct, and com	nplete Declaration of prep	pater (other than	taxpayer) is based on all informa	ition of which preparer ha	s any knowledge ret	urn with th	e prepar	er
He	ere	X7 yanby	1 Lackey 5!		15/(2/16	(vast	èe [	X Yes		∐ No
	Sigi	nature of officer or trustee			Date	Title	<u> </u>			
		Print/Type preparer's na	ame	Preparer's si	gnature /	Date	Check if PTIN			
			_	Honk	11/1/1		self- employed			
	aid	STEVE OBER		NIM	caw. Over	05/12/16		0848		
	eparer	Firm's name ► DEL	OITTE TAX	ΓΪ⁄Ъ			Firm's EIN ► 86-1	0657	72	
U	se Only									
		Firm's address ► 20			ET			25 0	000	
		I BO	STON, MA	02116			Phone no. 617-4	3 <u>1-2</u>	000	

Part XV Supplementary Information Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, Recipient Foundation status of Purpose of grant or contribution show any relationship to any foundation manager or substantial contributor Amount Name and address (home or business) recipient THE CARPENTER'S BOAT SHOP NONE 501 (C) (3) GENERAL WELFARE 3,000. THE MASTERS SCHOOL NONE 501 (C) (3) EDUCATION 15,000. NONE 501 (C) (3) GENERAL WELFARE TRUSTEES OF RESERVATIONS 1,000. WOMEN'S LUNCH PLACE NONE 501 (C) (3) GENERAL WELFARE 1,000. 20,000. Total from continuation sheets

FORM 990-PF D	IVIDENDS	AND INTER	EST FROM SECUE	RITIES S'	PATEMENT 1
	GROSS AMOUNT	CAPITAL GAINS DIVIDEND	REVENUE	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
CAPITAL GAIN DISTRIBUTION CAPITAL GUARDIAN	1,760.	1,76	0. 0.	. 0.	
#045491	9,133.		0. 9,133	9,133.	
CAPITAL GUARDIAN #046788	9,890.		0. 9,890	9,890.	
TO PART I, LINE 4	20,783.	1,76	0. 19,023	19,023.	
FORM 990-PF	<del></del>	ACCOUNTI	NG FEES	S	PATEMENT 2
DESCRIPTION		(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DELOITTE TAX LLP		4,500.	0.		4,500.
TO FORM 990-PF, PG 1,	LN 16B	4,500.	0.		4,500.
		· ·			<del></del>
FORM 990-PF	ОТ	HER PROFES	SIONAL FEES	S	TATEMENT 3
FORM 990-PF  DESCRIPTION		HER PROFES  (A)  EXPENSES PER BOOKS	(B) NET INVEST-	(C) ADJUSTED NET INCOME	(D)
		(A) EXPENSES	(B) NET INVEST-	(C) ADJUSTED	(D) CHARITABLE PURPOSES
DESCRIPTION		(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED	(D) CHARITABLE PURPOSES
DESCRIPTION INVESTMENT FEES TO FORM 990-PF, PG 1,		(A) EXPENSES PER BOOKS 200.	(B) NET INVEST- MENT INCOME  200.	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES  0.
DESCRIPTIONINVESTMENT FEES		(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME  200.	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DESCRIPTION INVESTMENT FEES TO FORM 990-PF, PG 1,	LN 16C	(A) EXPENSES PER BOOKS 200.	(B) NET INVEST- MENT INCOME  200.	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES  0.  0.  TATEMENT 4
DESCRIPTION INVESTMENT FEES TO FORM 990-PF, PG 1, FORM 990-PF	LN 16C	(A) EXPENSES PER BOOKS 200. 200. TAX	(B) NET INVEST- MENT INCOME  200.  200.  ES  (B) NET INVEST-	(C) ADJUSTED NET INCOME  (C) ADJUSTED	(D) CHARITABLE PURPOSES  0.  0.  TATEMENT 4  (D) CHARITABLE

FORM 990-PF	CORPORATE STOCK		STATEMENT 5
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
600 SHS NOBLE CORP		23,722.	6,330.
800 SHS WEATHERFORD INTL LTD		23,023.	6,712.
300 SHS APACHE CORP		20,364.	13,341.
900 SHS JP MORGAN CHASE		42,069.	59,427.
606 SHS JOHNSON & JOHNSON		17,697.	62,248.
1500 SHS MEDICAL PROPERTIES TRU	ST	18,736.	17,265.
400 SHS MEDTRONIC INC		30,780.	30,768.
500 SHS STRYKER CORP		22,239.	46,470.
1000 SHS WALGREEN BOOTS ALLIANC	E ICN	44,620.	85,155.
1000 SHS AMERICAN EXPRESS CO		22,833.	69,550.
3000 SHS HANG SENG BANK LTD		40,809.	57,096.
1000 SHS PLUM CREEK TIMBER CO		28,676.	47,720.
2000 SHS TECO ENERGY		20,386.	53,300.
100 SHS IBM		18,157.	13,762.
100 SHS IBM		18,915.	13,762.
300 SHS PARAGON OFFSHORE PLC	_	3,332.	19.
300 SHS GENERAL ELECTRIC CO COM		7,858.	9,345.
1160 SHS EXXON MOBILE CORP		0.	90,422.
511 SHS SEMPRA ENERGY		0.	48,039.
80 SHS ZIMMER HOLDINGS		0.	8,207.
TOTAL TO FORM 990-PF, PART II,	LINE 10B	404,216.	738,938.

FORM 990-PF·	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS			STATEMENT 6	
NAME AND ADDRESS		TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
F. DANBY LACKEY, P.O. BOX 1038 GROTON, MA 01450	III	TRUSTEE 1.00	0.	0.	0.
ELIZABETH LACKEY P.O. BOX 1038 GROTON, MA 01450		TRUSTEE 1.00	0.	0.	0.
ELIAZABETH C. KRZ P.O. BOX 1038 GROTON, MA 01450	AUSE	TRUSTEE 1.00	0.	0.	0.
JOHN LACKEY P.O. BOX 1038 GROTON, MA 01450		TRUSTEE 1.00	0.	0.	0.
CAROLYN LACKEY P.O. BOX 1038 GROTON, MA 01450		TRUSTEE 1.00	0.	0.	0.
TOTALS INCLUDED	ON 990-PF, PAGE 6	, PART VIII	0.	0.	0.