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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 separate instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2015

Open to Public Inspection

For calendar year 2015 or tax year beginning

, and ending

Name of foundation

STODDARD CHARITABLE TRUST

Number and street (or P O box number if mail is not delivered to street address)

370 MAIN STREET 12TH FLOOR

Room/suite

City or town, state or province, country, and ZIP or foreign postal code

WORCESTER, MA 01608-1779

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name change

H Check type of organization:

☐ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust ☒ Other taxable private foundation

I Fair market value of all assets at end of year

(from Part II, col (c), line 16)

\$ 82,517,965.

J Accounting method:

☒ Cash☐ Accrual☐ Other (specify)

(Part I, column (d) must be on cash basis.)

A Employer identification number

04-6023791

B Telephone number

508-459-8000

C If exemption application is pending, check here ☐D 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))

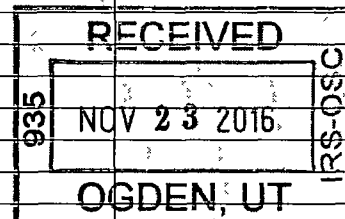
(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

1	Contributions, gifts, grants, etc., received			N/A	
2	Check ☒ if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments	41.			STATEMENT 1
4	Dividends and interest from securities	2,843,017.	2,768,701.		STATEMENT 2
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	1,442,079.			
b	Gross sales price for all assets on line 6a	18,149,515.			
7	Capital gain net income (from Part IV, line 2)		1,442,079.		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less: Cost of goods sold				
c	Gross profit or (loss)				
11	Other income	68,956.	3,741.		STATEMENT 3
12	Total. Add lines 1 through 11	4,354,093.	4,214,521.		
13	Compensation of officers, directors, trustees, etc	0.	0.		0.
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees				
b	Accounting fees	STMT 4 420,000.	210,000.		210,000.
c	Other professional fees	STMT 5 72,363.	72,363.		0.
17	Interest				
18	Taxes	STMT 6 345,964.	0.		0.
19	Depreciation and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses	STMT 7 81,246.	78,510.		2,736.
24	Total operating and administrative expenses. Add lines 13 through 23	919,573.	360,873.		212,736.
25	Contributions, gifts, grants paid	4,291,564.			4,291,564.
26	Total expenses and disbursements. Add lines 24 and 25	5,211,137.	360,873.		4,504,300.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	<857,044.>			
b	Net investment income (if negative, enter -0-)		3,853,648.		
c	Adjusted net income (if negative, enter -0-)			N/A	



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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing				
	2	Savings and temporary cash investments		508,010.	1,051,316.	1,051,316.
	3	Accounts receivable ▶				
		Less: allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U.S. and state government obligations				
	b	Investments - corporate stock	STMT 8	37,180,858.	35,572,294.	57,757,863.
	c	Investments - corporate bonds	STMT 9	299,937.	299,937.	323,066.
	Liabilities	11	Investments - land, buildings, and equipment basis ▶			
		Less accumulated depreciation ▶				
12		Investments - mortgage loans				
13		Investments - other	STMT 10	22,365,788.	22,574,002.	23,385,720.
14		Land, buildings, and equipment: basis ▶				
		Less accumulated depreciation ▶				
15		Other assets (describe ▶)				
16		Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		60,354,593.	59,497,549.	82,517,965.
17		Accounts payable and accrued expenses				
18		Grants payable				
Net Assets or Fund Balances	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶)				
23	Total liabilities (add lines 17 through 22)		0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ☐ and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ☒ and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds		0.	0.	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.	
	29	Retained earnings, accumulated income, endowment, or other funds		60,354,593.	59,497,549.	
30	Total net assets or fund balances		60,354,593.	59,497,549.		
31	Total liabilities and net assets/fund balances		60,354,593.	59,497,549.		

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	60,354,593.
2	Enter amount from Part I, line 27a	2	<857,044.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	59,497,549.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	59,497,549.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a			
b SEE ATTACHED STATEMENT			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e 18,149,515.		17,033,307.	1,442,079.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			1,442,079.

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	1,442,079.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3	N/A

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

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2014	4,290,212.	89,237,585.	.048076
2013	4,323,658.	83,703,253.	.051655
2012	4,071,765.	77,830,330.	.052316
2011	4,047,121.	75,939,532.	.053294
2010	3,156,001.	69,823,455.	.045200

2 Total of line 1, column (d)	2	.250541
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	.050108
4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5	4	85,746,607.
5 Multiply line 4 by line 3	5	4,296,591.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	38,536.
7 Add lines 5 and 6	7	4,335,127.
8 Enter qualifying distributions from Part XII, line 4	8	4,504,300.

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 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)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	38,536.
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	38,536.
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	38,536.
6 Credits/Payments:			
a 2015 estimated tax payments and 2014 overpayment credited to 2015	6a	88,040.	
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	88,040.	
8 Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	52.	
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	49,452.	
11 Enter the amount of line 10 to be: Credited to 2016 estimated tax ☒ 49,452. Refunded ☐	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ☐ \$ 0. (2) On foundation managers. ☐ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ☐ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	X	
b If "Yes," has it filed a tax return on Form 990-T for this year?	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ MA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

Part 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? Website address ► N/A	13	X
14 The books are in care of ► FLETCHER TILTON PC Telephone no. ► (508) 459-8000 Located at ► 370 MAIN STREET 12TH FLOOR, WORCESTER, MA ZIP+4 ► 01608-1779		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A		
16 At any time during calendar year 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 the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	16	X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ 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)? ☐ Yes ☒ 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.) ☐ Yes ☒ No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ► ☐	1b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2015?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)): a At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? ☐ Yes ☒ No If "Yes," list the years ► , , , b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► , , ,	2b	
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ 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? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015.) N/A	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 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?	4a	X
	4b	X

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)?

N/A

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?

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

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

6b

X

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?

N/A

7b

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
WARNER S. FLETCHER 11 MONMOUTH ROAD WORCESTER, MA 01606	CHAIRMAN/TTEE 10.00	0.	0.	0.
ALLEN W. FLETCHER 53 ELM STREET WORCESTER, MA 01608	TRUSTEE 1.00	0.	0.	0.
JUDITH S. KING 140 MAIN STREET SOUTHBORO, MA 01772	TREAS/TTEE 1.00	0.	0.	0.
VALERIE S. LORING 16 MILITARY ROAD WORCESTER, MA 01609	SEC/TTEE 1.00	0.	0.	0.

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

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

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

0

Part VIII**Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
FLETCHER TILTON PC 370 MAIN ST. 12TH FLOOR, WORCESTER, MA 01608	TRUST & ACCOUNTING FEES	420,000.
NIXON PEABODY 370 MAIN ST. 12TH FLOOR, WORCESTER, MA 01608	CUSTODIAL FEES	72,363.

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

0

Part IX-A**Summary of Direct Charitable Activities**

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

Expenses

1	N/A	
2		
3		
4		

Part IX-B**Summary of Program-Related Investments**

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

Amount

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

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	85,816,412.
b	Average of monthly cash balances	1b	1,235,981.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	87,052,393.
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	87,052,393.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	1,305,786.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	85,746,607.
6	Minimum investment return. Enter 5% of line 5	6	4,287,330.

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	4,287,330.
2a	Tax on investment income for 2015 from Part VI, line 5	2a	38,536.
b	Income tax for 2015. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	38,536.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	4,248,794.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	4,248,794.
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	4,248,794.

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	4,504,300.
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	0.
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	4,504,300.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	38,536.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	4,465,764.

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				4,248,794.
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only			104,133.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2015:				
a From 2010				
b From 2011				
c From 2012				
d From 2013				
e From 2014				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2015 from Part XII, line 4: ► \$ 4,504,300.				
a Applied to 2014, but not more than line 2a			104,133.	
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				4,248,794.
e Remaining amount distributed out of corpus	151,373.			
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:	151,373.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	151,373.			
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 instr.			0.	
f Undistributed income for 2015. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2016				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	0.			
9 Excess distributions carryover to 2016 Subtract lines 7 and 8 from line 6a	151,373.			
10 Analysis of line 9:				
a Excess from 2011				
b Excess from 2012				
c Excess from 2013				
d Excess from 2014				
e Excess from 2015	151,373.			

N/A

- ☐ 4942(j)(3) or ☐ 4942(j)(5)

- (4) Gross investment income

[illegible]

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

Part XV **Supplementary Information** (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
FROM MULTIPLE K-1'S	NONE		K-1 CHARITABLE CONTRIBUTIONS	564.
SEE ATTACHED LIST	NONE	PUBLIC	VARIOUS	4,291,000.
Total			3a	4,291,564.
b Approved for future payment				
SEE ATTACHED LIST	NONE	PUBLIC	VARIOUS	6,210,000.
Total			3b	6,210,000.

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

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

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

☐ Yes ☒ No

b If "Yes," complete the following schedule.

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

**Sign
Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

May the IRS discuss this return with the preparer shown below (see instr.)?

☒ Yes ☐ No

Signature of officer or trustee

Date _____

Title

Print/Type preparer's name

Preparer's signature

Date _____

Check ☐ self-employed

PTIN

SANDRA ZDONCZYK

Firm's name ▶ **FLETCHER TILTON PC**

11/14/16

Firm's EIN ► 04-2628601

Firm's address ► 370 MAIN STREET, 12TH FLOOR
WORCESTER, MA 01608-1779

Phone no. (508) 459-8000

Form **990-PF** (2015)

STODDARD CHARITABLE TRUST

CONTINUATION FOR 990-PF, PART IV

04-6023791

PAGE

1 OF

1

Part IV Capital Gains and Losses for Tax on Investment Income(a) List and describe the kind(s) of property sold, e.g., real estate,
2-story brick warehouse; or common stock, 200 shs. MLC Co.(b) How acquired
P - Purchase
D - Donation(c) Date acquired
(mo., day, yr.)(d) Date sold
(mo., day, yr.)

1a	FTW&CO	P		
b	FTW&CO	P		
c	FTW&CO	P		
d	FROM K-1'S - LTG			
e	FROM K-1'S - ORDINARY GAIN			
f	FROM K-1'S - SECTION 1231			
g	FROM K-1'S - STG			
h	REGENCY ENERGY PARTNERS	P		
i	CAPITAL GAINS DIVIDENDS			
j				
k				
l				
m				
n				
o				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	2,971,952.	3,052,361.	<80,409.>
b	6,300,842.	6,616,758.	<315,916.>
c	8,358,914.	7,288,749.	1,070,165.
d			109,302.
e			212,373.
f			3,933.
g			263.
h	396,106.	75,439.	320,667.
i	121,701.		121,701.
j			
k			
l			
m			
n			
o			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			<80,409.>
b			<315,916.>
c			1,070,165.
d			109,302.
e			212,373.
f			3,933.
g			263.
h			320,667.
i			121,701.
j			
k			
l			
m			
n			
o			

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

1,442,079.

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):

If gain, also enter in Part I, line 8, column (c).

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

3

N/A

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e)
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount		Related or exempt function income
1 Program service revenue:						
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			14	41.		
4 Dividends and interest from securities			14	2,843,017.		
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			14	3,741.		
8 Gain or (loss) from sales of assets other than inventory			18	1,442,079.		
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue:						
a PARTNERSHIP K-1 ORDINARY						
b LOSS	523000	<54,083.>				
c FEDERAL TAX REFUND	525990					119,298.
d _____						
e _____						
12 Subtotal. Add columns (b), (d), and (e)		<54,083.>		4,288,878.		119,298.
13 Total. Add line 12, columns (b), (d), and (e)						4,354,093.

(See worksheet in line 13 instructions to verify calculations.)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

[illegible]

Stoddard 2015 Payments Made

Coding Sheet: Fund is 'Stoddard Charitable Trust' AND Date Paid was in last year
5/10/2016

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
<u>Stoddard Charitable Trust</u>				
Abby's House Electrical System \$20,000 00	7315071	3/18/2015	\$20,000.00	
Alameda County Community Food Bank Santa Claus Grant \$1,000.00	7315941	12/2/2015	\$1,000.00	
American Antiquarian Society Repairs and Restorations \$125,000 00	7315616	9/16/2015	\$125,000.00	
American Antiquarian Society Santa Claus Grant \$5,000 00	7315942	12/2/2015	\$5,000 00	
American Cancer Society - Hope Lodge Various Repairs \$30,000.00	7315819	12/16/2015	\$30,000 00	
American Red Cross of Central Massachusetts Disaster Relief Fund \$25,000 00	7315623	9/16/2015	\$25,000 00	
Animal Welfare Society Santa Claus Grant \$2,500 00	7315867	12/1/2015	\$2,500 00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Appalachian Mountain Club <i>Youth Opportunities Program</i> \$10,000.00	7315065	3/18/2015	\$10,000.00	
Apple Tree Arts <i>Capital Campaign</i> \$25,000.00	7315458	6/17/2015	\$25,000.00	
Ascentria Care Alliance <i>Tracking System</i> \$30,000.00	7315900	12/16/2015	\$30,000.00	
Bancroft School <i>Infrastructure & Capital Projects</i> \$2,000,000.00	7315647	9/16/2015	\$250,000.00	
Bay Area Wilderness Training <i>Santa Claus Grant</i> \$2,000.00	7315916	12/2/2015	\$2,000.00	
Be Like Brit Foundation, Inc. <i>Operations Center</i> \$5,000.00	7315031	3/18/2015	\$5,000.00	
Becker College <i>Business Center</i> \$200,000.00	7315455	6/17/2015	\$200,000.00	
Big Brothers Big Sisters of Central Mass/Metrowest <i>Equipment Purchases</i> \$15,000.00	7315441	6/17/2015	\$15,000.00	
Blackstone River Valley National Heritage Corridor <i>Operating Support</i> \$60,000.00	7313919	12/15/2015	\$15,000.00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Blair Academy Santa Claus Grant \$2,000 00	7315943	12/2/2015	\$2,000 00	
Bottom Line Success Program \$5,000.00	7315602	9/16/2015	\$5,000 00	
Bottom Line Santa Claus Grant \$1,000.00	7315945	12/2/2015	\$1,000.00	
Boys and Girls Club of Worcester Debt Reduction \$100,000.00	7315653	8/27/2015	\$100,000.00	
Bridge of Central Massachusetts, Inc. Technology Implementation \$25,000 00	7315499	6/17/2015	\$25,000.00	
Canal District Alliance Canalfest 2015 \$5,000.00	7315094	6/17/2015	\$5,000.00	
Cancer Support Community Santa Claus Grant \$4,000.00	7315946	12/2/2015	\$4,000.00	
Cape Abilities Santa Claus Grant \$5,000 00	7315938	12/2/2015	\$5,000.00	
Carlisle Charitable Foundation Santa Claus Grant \$2,500.00	7315923	12/2/2015	\$2,500.00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
CASA Project, Inc. (The) <i>Court Advocacy Program</i> \$20,000.00	7315497	6/17/2015	\$20,000.00	
CASA Project, Inc. (The) <i>Santa Claus Grant</i> \$5,000.00	7315924	12/2/2015	\$5,000.00	
The ChadTough Foundation <i>Santa Claus Grant</i> \$2,500.00	7315925	12/2/2015	\$2,500.00	
Children's Day School <i>Santa Claus Grant</i> \$5,000.00	7315926	12/2/2015	\$5,000.00	
Boston Children's Hospital <i>Santa Claus Grant</i> \$5,000.00	7315944	12/2/2015	\$5,000.00	
City of Worcester <i>Summer Program</i> \$25,000.00	7315580	6/17/2015	\$25,000.00	
Clark University <i>Alumni Center</i> \$300,000.00	7315641	9/16/2015	\$200,000.00	
Clark University <i>Public Health Program</i> \$30,000.00	7314867	12/21/2015	\$10,000.00	
College of the Holy Cross aka Holy Cross <i>Santa Claus Grant</i> \$2,500.00	7315937	12/2/2015	\$2,500.00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Community Harvest Project, Inc. <i>Mower and Bins</i> \$10,000.00	7315646	9/16/2015	\$10,000.00	
Cradles to Crayons <i>Santa Claus Grant</i> \$2,500 00	7315928	12/2/2015	\$2,500.00	
Creativity Explored <i>Santa Claus Grant</i> \$5,000 00	7315929	12/2/2015	\$5,000.00	
Critical Exposure <i>Santa Claus Grant</i> \$2,500 00	7315930	12/2/2015	\$2,500 00	
Dartmouth College - Tuck School of Business <i>Santa Claus Grant</i> \$2,000 00	7315910	12/2/2015	\$2,000.00	
Dickinson College <i>Santa Claus Grant</i> \$1,000.00	7315931	12/2/2015	\$1,000.00	
Dismas House of Massachusetts, Inc. <i>Project Coordinator</i> \$10,000.00	7315088	6/17/2015	\$10,000.00	
Doctors Without Borders/Medecins Sans Frontieres <i>Santa Claus Grant</i> \$1,000.00	7315932	12/2/2015	\$1,000.00	
Dynamy, Inc. <i>Youth Academy</i> \$10,000.00	7315902	12/16/2015	\$10,000 00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
East Bay SPCA <i>Santa Claus Grant</i> \$1,000.00	7315933	12/2/2015	\$1,000.00	
Easter Seals Massachusetts <i>Infrastructure Upgrades</i> \$30,000 00	7315070	3/18/2015	\$30,000 00	
EcoTarium <i>3rd Century Plan Phase II</i> \$750,000.00	7315462	6/17/2015	\$200,000.00	
Emerson Elementary School - Emerson PTO/Faith Network <i>Santa Claus Grant</i> \$2,000.00	7315934	12/2/2015	\$2,000.00	
Ever After Mustang Rescue <i>Santa Claus Grant</i> \$2,500 00	7315876	12/1/2015	\$2,500.00	
Family Health Center of Worcester <i>Capital Campaign</i> \$250,000 00	7314866	12/16/2015	\$50,000.00	
First Baptist Church <i>Santa Claus Grant</i> \$5,000.00	7315919	12/2/2015	\$5,000.00	
First Night Worcester <i>First Night 2016</i> \$8,000.00	7315136	6/17/2015	\$8,000 00	
Francis Ouimet Scholarship Fund <i>Caddie Project</i> \$10,000 00	7315454	6/17/2015	\$10,000 00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Friends of Wissahickon <i>Santa Claus Grant</i> \$1,000.00	7315917	12/2/2015	\$1,000 00	
Genesis Club, Inc. <i>Van Purchase</i> \$25,000.00	7315651	9/16/2015	\$25,000 00	
Girls Incorporated of Worcester <i>Capital Campaign</i> \$1,250,000.00	7315421	6/17/2015	\$250,000.00	
Greater Worcester Land Trust <i>Land Acquisition Fund</i> \$300,000 00	7315447	6/17/2015	\$100,000.00	
Greater Worcester Land Trust <i>Santa Claus Grant</i> \$5,000.00	7315935	12/2/2015	\$5,000.00	
Heyday Books <i>Santa Claus Grant</i> \$2,500 00	7315936	12/2/2015	\$2,500 00	
Homes for Our Troops <i>Santa Claus Grant</i> \$2,500.00	7315864	12/1/2015	\$2,500 00	
Interfaith Hospitality Network of Greater Worcester <i>Capital Campaign</i> \$20,000 00	7315495	6/17/2015	\$20,000.00	
Jackson Laboratory <i>Santa Claus Grant</i> \$2,500.00	7315865	12/2/2015	\$2,500 00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Jeremiah's Inn New Boulders \$30,000.00	7315138	6/17/2015	\$30,000.00	
Jericho Road Worcester Operating Support \$10,000 00	7315640	9/16/2015	\$10,000.00	
Jewish Community Center (Worcester JCC) Upgrades & Improvements \$25,000.00	7315463	6/17/2015	\$25,000.00	
Jimmy Fund Santa Claus Grant \$5,000.00	7315879	12/1/2015	\$5,000 00	
Joy of Music Program, Inc. Hall Expansion \$100,000.00	7315450	6/17/2015	\$50,000 00	
Joy of Music Program, Inc. Santa Claus Grant \$2,000 00	7315866	12/1/2015	\$2,000.00	
Joy of Music Program, Inc. Hall Expansion \$100,000.00	7315450	12/16/2015	\$50,000.00	
Joy of Music Program, Inc. Financial Aid \$5,000.00	7315806	12/16/2015	\$5,000.00	
KGLT Radio Santa Claus Grant \$4,000.00	7315868	12/1/2015	\$4,000.00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Community Legal Aid <i>Operating Budget</i> \$60,000 00	7315485	6/17/2015	\$30,000.00	
Literacy Volunteers of Greater Worcester <i>Operating Support</i> \$8,000 00	7315539	6/17/2015	\$8,000.00	
Main South Community Development Corporation <i>Operating Support</i> \$40,000.00	7315488	6/17/2015	\$40,000 00	
Maine Community Foundation Inc <i>Santa Claus Grant</i> \$2,500.00	7315870	12/1/2015	\$2,500.00	
Massachusetts Audubon Society-Worcester <i>Capital Campaign</i> \$400,000.00	7313853	12/16/2015	\$100,000.00	
Massachusetts College of Art <i>Santa Claus Grant</i> \$2,500.00	7315869	12/1/2015	\$2,500 00	
Massachusetts College of Pharmacy and Health Sciences <i>Lab & Clinic Creation</i> \$300,000 00	7313975	12/21/2015	\$100,000.00	
Massachusetts Education and Career Opportunities, Inc. (Mass EdCO) <i>Santa Claus Grant</i> \$2,000.00	7315940	12/2/2015	\$2,000.00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Massachusetts Education and Career Opportunities, Inc. (Mass EdCO) <i>Operating Support</i> \$6,000.00	7315996	12/16/2015	\$6,000.00	
Massachusetts General Hospital <i>Santa Claus Grant</i> \$1,000.00	7315872	12/11/2015	\$1,000.00	
Massachusetts Symphony Orchestra <i>Tuckerman Hall Renovations</i> \$20,000.00	7315082	6/17/2015	\$20,000.00	
Massachusetts Symphony Orchestra <i>2015 Summer Concerts</i> \$15,000.00	7315103	6/17/2015	\$15,000.00	
Massachusetts Symphony Orchestra <i>Santa Claus Grant</i> \$1,000.00	7315949	12/2/2015	\$1,000.00	
McAuley Nazareth Home for Boys <i>Therapy Rooms</i> \$5,000.00	7315075	3/18/2015	\$5,000.00	
Mechanics Hall <i>Capital Projects</i> \$200,000.00	7315067	3/18/2015	\$100,000.00	
Medomak Valley Land Trust <i>Santa Claus Grant</i> \$2,000.00	7315871	12/1/2015	\$2,000.00	
Merrimack River Feline Rescue Society <i>Santa Claus Grant</i> \$2,000.00	7315874	12/1/2015	\$2,000.00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Middlebury College <i>Santa Claus Grant</i> \$2,500.00	7315873	12/1/2015	\$2,500.00	
Music Worcester, Inc. <i>Endowment</i> \$100,000.00	7314145	1/21/2015	\$100,000.00	
Music Worcester, Inc. <i>Santa Claus Grant</i> \$3,000.00	7315875	12/1/2015	\$3,000.00	
Nativity School of Worcester, Inc. <i>Santa Claus Grant</i> \$2,000.00	7315952	12/2/2015	\$2,000.00	
NEADS <i>New Kennel</i> \$10,000.00	7315483	6/17/2015	\$10,000.00	
The New School <i>Santa Claus Grant</i> \$2,500.00	7315888	12/1/2015	\$2,500.00	
Nichols College <i>Academic Building</i> \$50,000.00	7315433	6/17/2015	\$50,000.00	
Oak Hill Community Development Corporation <i>Operating Support</i> \$40,000.00	7315777	12/16/2015	\$40,000.00	
Oakland School Foundation/Urban Promise Academy <i>Santa Claus Grant</i> \$1,000.00	7315877	12/1/2015	\$1,000.00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Old Sturbridge Village <i>Langdon House</i> \$25,000 00	7315791	12/16/2015	\$25,000.00	
Park School of Baltimore <i>Santa Claus Grant</i> \$2,000.00	7315878	12/2/2015	\$2,000.00	
Pathways for Change, Inc. <i>UbiDuo2 System</i> \$4,000.00	7315696	12/16/2015	\$4,000.00	
Pleasant Street Neighborhood Network Center <i>Operating Support</i> \$5,000 00	7315574	9/16/2015	\$5,000.00	
Pomfret School <i>Santa Claus Grant</i> \$2,000 00	7315880	12/1/2015	\$2,000.00	
Preservation Worcester, Inc. <i>Santa Claus Grant</i> \$5,000 00	7315881	12/1/2015	\$5,000 00	
Quebec Labrador Foundation <i>Santa Claus Grant</i> \$5,000.00	7315882	12/1/2015	\$5,000.00	
Quinsigamond Community College Foundation <i>H A C E Awards</i> \$2,000 00	7315581	9/16/2015	\$2,000.00	
Rachel's Table <i>Milk Fund</i> \$5,000.00	7315146	6/17/2015	\$5,000 00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Rachel's Table <i>Santa Claus Grant</i> \$2,000 00	7315883	12/1/2015	\$2,000.00	
Regional Environmental Council of Central Massachusetts <i>Debt Reduction</i> \$20,000 00	7315493	6/17/2015	\$20,000 00	
Regional Environmental Council of Central Massachusetts <i>Santa Claus Grant</i> \$1,000 00	7315939	12/2/2015	\$1,000.00	
Regional Environmental Council of Central Massachusetts <i>Operating Support</i> \$10,000 00	7315898	12/16/2015	\$10,000 00	
Restorative Justice for Oakland Youth <i>Santa Claus Grant</i> \$1,000 00	7315927	12/2/2015	\$1,000 00	
Schuykill Center <i>Santa Claus Grant</i> \$1,000 00	7315884	12/1/2015	\$1,000 00	
Science of Spirituality <i>Santa Claus Grant</i> \$4,000.00	7315885	12/1/2015	\$4,000.00	
Seven Hills Foundation <i>Population Study</i> \$10,000 00	7315076	3/18/2015	\$10,000 00	
Springside Chestnut Hill Academy Fund <i>Santa Claus Grant</i> \$1,000.00	7315886	12/1/2015	\$1,000.00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Stone Soup Artist Activist Collective and Community Resource Center <i>Greenhouse Project</i> \$4,000 00	7315030	3/18/2015	\$4,000.00	
Sudbury Valley Trustees, Inc. <i>Santa Claus Grant</i> \$2,000.00	7315887	12/1/2015	\$2,000 00	
THRIVE <i>Santa Claus Grant</i> \$2,000 00	7315889	12/1/2015	\$2,000 00	
Tower Hill Botanic Garden <i>Santa Claus Grant</i> \$5,000 00	7315863	12/1/2015	\$5,000.00	
Trinity College <i>Santa Claus Grant</i> \$2,000.00	7315890	12/1/2015	\$2,000.00	
Tuckerman Hall <i>Santa Claus Grant</i> \$5,000 00	7315891	12/1/2015	\$5,000.00	
UMass Memorial Healthcare Community Healthlink <i>Plumley Village Programs</i> \$20,000.00	7315622	9/16/2015	\$10,000 00	
UMass Memorial Foundation c/o UMass Medicine Development Office <i>SCT Chair of Pediatrics</i> \$1,500,000 00	7315461	6/17/2015	\$750,000.00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Union College <i>Santa Claus Grant</i> \$2,000.00	7315911	12/2/2015	\$2,000.00	
United Way of Central Massachusetts <i>2015 Campaign</i> \$120,000.00	7315633	9/16/2015	\$120,000.00	
Veterans Inc. <i>Santa Claus Grant</i> \$2,000.00	7315947	12/2/2015	\$2,000.00	
Wardrobe for Opportunity <i>Santa Claus Grant</i> \$2,000.00	7315912	12/2/2015	\$2,000.00	
WCUW <i>Security System</i> \$13,000.00	7315074	3/18/2015	\$13,000.00	
White Oak Land Conservation Society, Inc. <i>Holden Land</i> \$40,000.00	7315642	9/16/2015	\$40,000.00	
White Oak Land Conservation Society, Inc. <i>Santa Claus Grant</i> \$5,000.00	7315915	12/2/2015	\$5,000.00	
Worcester Animal Rescue League <i>Santa Claus Grant</i> \$10,000.00	7315918	12/2/2015	\$10,000.00	
Worcester Center for Crafts <i>Operating Support</i> \$50,000.00	7315459	6/17/2015	\$50,000.00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Worcester Chamber Music Society <i>Santa Claus Grant</i> \$2,000.00	7315950	12/2/2015	\$2,000.00	
Worcester Chamber Music Society <i>Operating Support</i> \$2,000 00	7315778	12/16/2015	\$2,000.00	
Worcester Community Housing Resources, Inc. <i>Santa Claus Grant</i> \$5,000 00	7315920	12/2/2015	\$5,000.00	
Worcester Community Housing Resources, Inc. <i>Operating Support</i> \$15,000 00	7315909	12/16/2015	\$15,000.00	
Worcester County Food Bank <i>Santa Claus Grant</i> \$2,000 00	7315913	12/2/2015	\$2,000.00	
Worcester County Food Bank <i>Santa Claus Grant</i> \$3,000.00	7315914	12/2/2015	\$3,000 00	
Worcester County Food Bank <i>Santa Claus Grant</i> \$1,000.00	7315951	12/2/2015	\$1,000 00	
Worcester East Side Community Development Corporation <i>Programming Support</i> \$10,000.00	7315634	9/16/2015	\$10,000.00	
Worcester Education Collaborative <i>Program Support</i> \$10,000 00	7315142	6/17/2015	\$10,000 00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Worcester Educational Development Foundation, Inc. <i>LEAP Program</i> \$52,000.00	7315630	9/16/2015	\$52,000 00	
Worcester Historical Museum <i>Capital Campaign</i> \$750,000 00	7314784	12/21/2015	\$150,000.00	
Worcester Interfaith, Inc. <i>Employment Program</i> \$5,000 00	7315140	6/17/2015	\$5,000.00	
Worcester Interfaith, Inc. <i>Clemente Courses</i> \$45,000.00	7314437	10/15/2015	\$15,000 00	
Worcester Interfaith, Inc. <i>Santa Claus Grant</i> \$1,000.00	7315948	12/2/2015	\$1,000.00	
Worcester Latino Dollars for Scholars <i>Scholarship Funds</i> \$3,000 00	7315085	6/17/2015	\$3,000.00	
Worcester Polytechnic Institute <i>Santa Claus Grant</i> \$2,000.00	7315921	12/2/2015	\$2,000.00	
Worcester Regional Research Bureau, Inc. <i>Operating Support</i> \$9,000 00	7315087	6/17/2015	\$9,000 00	
Worcester Tree Initiative <i>Operating Support</i> \$10,000.00	7315906	12/16/2015	\$10,000 00	

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Check Number Notes
Worcester Youth Center, Inc. <i>Programming Support</i> \$15,000.00	7315617	9/16/2015	\$15,000.00	
Y.O.U., Inc. <i>Santa Claus Grant</i> \$5,000.00	7315922	12/2/2015	\$5,000.00	
YMCA of Central Massachusetts <i>2016 Campaign</i> \$10,000.00	7315895	12/16/2015	\$10,000.00	
YouthConnect Summer <i>2015 Summer Programs</i> \$10,000.00	7315048	3/18/2015	\$10,000.00	
YWCA of Central Massachusetts <i>Technology Improvement</i> \$50,000.00	7315473	6/17/2015	\$50,000.00	
		<i>Total Stoddard Charitable Trust</i> (154 items)	\$4,291,000.00	
		Grand Total (154 items)	\$4,291,000.00	

Stoddard Charitable Trust Payments Due After 2015

5/3/2016

Payee Organization Project Title, Grant Amount	Request ID Ref. No.	Due Date	Payment Amount Notes
Stoddard Charitable Trust			
Bancroft School Infrastructure & Capital Projects \$2,000,000 00	7315647	9/1/2016	\$250,000 00
Bancroft School Infrastructure & Capital Projects \$2,000,000 00	7315647	9/1/2017	\$250,000 00
Bancroft School Infrastructure & Capital Projects \$2,000,000 00	7315647	9/1/2018	\$500,000 00
Bancroft School Infrastructure & Capital Projects \$2,000,000 00	7315647	9/1/2019	\$500,000 00
Bancroft School Infrastructure & Capital Projects \$2,000,000 00	7315647	9/1/2020	\$250,000 00
Clark University Alumni Center \$300,000 00	7315641	9/1/2016	\$50,000 00
Clark University Public Health Program \$30,000 00	7314867	12/1/2016	\$10,000 00
Clark University Alumni Center \$300,000 00	7315641	9/1/2017	\$50,000 00

Payee Organization Project Title, Grant Amount	Request ID Ref. No.	Due Date	Payment Amount Notes
EcoTarium 3rd Century Plan Phase II \$750,000 00	7315462	12/1/2016	\$200,000 00
EcoTarium 3rd Century Plan Phase II \$750,000 00	7315462	12/1/2017	\$200,000 00
EcoTarium 3rd Century Plan Phase II \$750,000 00	7315462	12/1/2018	\$150,000 00
Girls Incorporated of Worcester Capital Campaign \$1,250,000 00	7315421	12/1/2016	\$250,000 00
Girls Incorporated of Worcester Capital Campaign \$1,250,000 00	7315421	12/1/2017	\$250,000 00
Girls Incorporated of Worcester Capital Campaign \$1,250,000 00	7315421	12/1/2018	\$250,000 00
Girls Incorporated of Worcester Capital Campaign \$1,250,000 00	7315421	12/1/2019	\$250,000 00
Greater Worcester Land Trust Land Acquisition Fund \$300,000 00	7315447	6/1/2016	\$100,000 00
Greater Worcester Land Trust Land Acquisition Fund \$300,000 00	7315447	6/1/2017	\$100,000 00

Payee Organization Project Title, Grant Amount	Request ID Ref. No.	Due Date	Payment Amount Notes
Hanover Theatre for the Performing Arts 551 Main Street \$300,000 00	7314638	9/1/2016	\$100,000 00
Community Legal Aid Operating Budget \$60,000 00	7315485	12/1/2016	\$20,000 00
Community Legal Aid Operating Budget \$60,000 00	7315485	12/1/2017	\$10,000 00
Mechanics Hall Capital Projects \$200,000 00	7315067	3/1/2016	\$100,000 00
Quinsigamond Community College Foundation 18-20 Franklin Street \$500,000 00	7314522	6/1/2016	\$100,000 00
UMass Memorial Healthcare Community Healthlink Plumley Village Programs \$20,000 00	7315622	9/1/2016	\$10,000 00
UMass Memorial Foundation c/o UMass Medicine Development Office SCT Chan of Pediatrics \$1,500,000 00	7315461	6/1/2016	\$750,000 00
Worcester Art Museum Higgins Armory Collection \$1,500,000 00	7313851	6/25/2016	\$300,000 00
Worcester Art Museum Higgins Armory Collection \$1,500,000 00	7313851	6/25/2017	\$300,000 00

Payee Organization Project Title, Grant Amount	Request ID Ref. No.	Due Date	Payment Amount Notes
Worcester Historical Museum Capital Campaign \$750,000 00	7314784	12/1/2016	\$150,000 00
Worcester Historical Museum Capital Campaign \$750,000 00	7314784	12/1/2017	\$150,000 00
Worcester Interfaith, Inc. Clemente Courses \$45,000 00	7314437	6/1/2016	\$10,000 00
YMCA of Central Massachusetts Capital Campaign \$1,000,000 00	7314370	3/28/2016	\$200,000 00
YMCA of Central Massachusetts Capital Campaign \$1,000,000 00	7314370	3/28/2017	\$200,000 00
YMCA of Central Massachusetts Capital Campaign \$1,000,000 00	7314370	3/28/2018	\$200,000 00
Total Stoddard Charitable Trust (32 items)			\$6,210,000 00
Grand Total (32 items)			\$6,210,000.00

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

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
K-1'S - MUNI INTEREST	41.	0.	
TOTAL TO PART I, LINE 3	41.	0.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
FTW&CO - CGD	121,701.	121,701.	0.	0.	
FTW&CO - CORP					
INTEREST	15,000.	0.	15,000.	15,000.	
FTW&CO - DIV/STCGD	63.	0.	63.	63.	
FTW&CO - NON DIV					
DIST	76,316.	0.	76,316.	2,000.	
FTW&CO DIVIDENDS	2,683,258.	0.	2,683,258.	2,683,258.	
RS INTEREST	135.	0.	135.	135.	
K-1 DIVIDENDS	13,664.	0.	13,664.	13,664.	
K-1 INTEREST	54,581.	0.	54,581.	54,581.	
TO PART I, LINE 4	2,964,718.	121,701.	2,843,017.	2,768,701.	

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
-1 ROYALTIES	2,076.	2,076.	
-1 OTHER PORTFOLIO INCOME	1,502.	1,502.	
LITIGATION SETTLEMENT	163.	163.	
PARTNERSHIP K-1 ORDINARY LOSS	<54,083.>	0.	
FEDERAL TAX REFUND	119,298.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	68,956.	3,741.	

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TRUST AND ACCOUNTING FEES	420,000.	210,000.		210,000.
TO FORM 990-PF, PG 1, LN 16B	420,000.	210,000.		210,000.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
CUSTODIAL FEES	72,363.	72,363.		0.
TO FORM 990-PF, PG 1, LN 16C	72,363.	72,363.		0.

FORM 990-PF TAXES STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAX WITHHELD	21,675.	0.		0.
US TREASURY PYMTS	321,704.	0.		0.
FOREIGN TAX WITHHELD - K-1'S	2,585.	0.		0.
TO FORM 990-PF, PG 1, LN 18	345,964.	0.		0.

FORM 990-PF	OTHER EXPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
K-1 EXPENSES	40,170.	40,170.		0.	
MICROEDGE FEE	1,749.	0.		1,749.	
ADR TAX RECLAMATION FEE	959.	959.		0.	
COMM OF MASS FILING FEE PC	500.	0.		500.	
FROM MULTIPLE K-1'S -					
INTANGIBLE DRILLING EXPENSE	10,552.	10,552.		0.	
FROM MULTIPLE K-1'S -					
INVESTMENT INTEREST EXPENSE	26,829.	26,829.		0.	
OFFICE EXPENSE	487.	0.		487.	
TOTAL TO FORM 990-PF, PG 1, LN 23	81,246.	78,510.		2,736.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	8
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
EQUITY STOCK	24,519,033.	46,152,457.		
MUTUAL FUNDS	11,053,261.	11,605,406.		
TOTAL TO FORM 990-PF, PART II, LINE 10B	35,572,294.	57,757,863.		

FORM 990-PF	CORPORATE BONDS		STATEMENT	9
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
CORPORATE BONDS	299,937.	323,066.		
TOTAL TO FORM 990-PF, PART II, LINE 10C	299,937.	323,066.		

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	10
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
LIMITED PARTNERSHIPS	COST	3,431,807.	5,890,318.
PREFERRED STOCK	COST	18,108,545.	16,461,752.
MERCANTILE CAPITAL LLC	COST	772,500.	772,500.
CAMBRIDGE SEMANTICS	COST	261,150.	261,150.
TOTAL TO FORM 990-PF, PART II, LINE 13		22,574,002.	23,385,720.

FORM 990-PF	GRANT APPLICATION SUBMISSION INFORMATION	STATEMENT 11
	PART XV, LINES 2A THROUGH 2D	

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

WARNER S. FLETCHER 370 MAIN STREET 12TH FLOOR, WORCESTER, MA 01608

TELEPHONE NUMBER

508-459-8000

FORM AND CONTENT OF APPLICATIONS

APPLICATIONS SHOULD BE MADE BY LETTER SUBMITTED IN QUINTUPLICATE SUMMARIZING A REQUEST, TOGETHER WITH BACKGROUND INFORMATION. INCLUDE A COPY OF THE IRS TAX EXEMPTION LETTER.

ANY SUBMISSION DEADLINES

APPLICATIONS SHOULD BE RECEIVED TWO OR MORE WEEKS PRIOR TO ONE OF FIVE OR SIX YEARLY DISTRIBUTION MEETINGS.

RESTRICTIONS AND LIMITATIONS ON AWARDS

GRANTS ARE AWARDED IN THE CULTURAL, EDUCATIONAL AND SOCIAL SERVICE NEED AREAS PRIMARILY IN THE CITY OF WORCESTER.