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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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2015

Open to Public  
Inspection

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

Name of foundation HENDERSON FOUNDATION C/O ROBERTA HENDERSON		A Employer identification number 04-6051095					
		B Telephone number (see instructions) (978) 443-9000					
Number and street (or P O box number if mail is not delivered to street address) PO BOX 420		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 ►					
City or town, state or province, country, and ZIP or foreign postal code SUDSBURY, MA 01776							
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) ► \$ 11,454,489		J Accounting method Cash      Accrual Other (specify) _____ (Part I, column (d) must be on cash basis )					
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) (see instructions))		Revenue and expenses per books (a)	Net investment income (b)	Adjusted net income (c)	Disbursements for charitable purposes (d) (cash basis only)		
1	Contributions, gifts, grants, etc, received (attach schedule)						
2	Check ► <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B						
3	Interest on savings and temporary cash investments	79	79				
4	Dividends and interest from securities	317,362	317,362				
5a	Gross rents						
b	Net rental income or (loss)						
6a	Net gain or (loss) from sale of assets not on line 10	82,924					
b	Gross sales price for all assets on line 6a 6,853,664						
7	Capital gain net income (from Part IV, line 2)		82,924				
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) (attach schedule)						
11	Other income (attach schedule)	155,562	136,562	0			
12	<b>Total</b> .Add lines 1 through 11	555,927	536,927	0			
13	Compensation of officers, directors, trustees, etc	60,111	30,056	0	30,313		
14	Other employee salaries and wages						
15	Pension plans, employee benefits						
16a	Legal fees (attach schedule)						
b	Accounting fees (attach schedule)	17,100	15,390	0	1,710		
c	Other professional fees (attach schedule)						
17	Interest						
18	Taxes (attach schedule) (see instructions)	16,844	12,646	0	0		
19	Depreciation (attach schedule) and depletion						
20	Occupancy						
21	Travel, conferences, and meetings						
22	Printing and publications						
23	Other expenses (attach schedule)	165,049	152,476	0	10,318		
24	<b>Total operating and administrative expenses.</b>						
	Add lines 13 through 23	259,104	210,568	0	42,341		
25	Contributions, gifts, grants paid	563,000					
26	<b>Total expenses and disbursements.</b> Add lines 24 and 25	822,104	210,568	0	607,341		
27	Subtract line 26 from line 12						
a	<b>Excess of revenue over expenses and disbursements</b>	-266,177					
b	<b>Net investment income</b> (if negative, enter -0-)		326,359				
c	<b>Adjusted net income</b> (if negative, enter -0-)			0			

	<b>Part II Balance Sheets</b> Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions )	Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash—non-interest-bearing . . . . .	98,947	198,492	198,492
	2 Savings and temporary cash investments . . . . .	920,881	801,241	801,241
	3 Accounts receivable ► _____			
	Less allowance for doubtful accounts ► _____			
	4 Pledges receivable ► _____			
	Less allowance for doubtful accounts ► _____			
	5 Grants receivable . . . . .			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	7 Other notes and loans receivable (attach schedule) ► _____			
	Less allowance for doubtful accounts ► _____			
	8 Inventories for sale or use . . . . .			
	9 Prepaid expenses and deferred charges . . . . .			
	10a Investments—U S and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule) . . . . .	8,615,542	8,317,450	10,257,018
	c Investments—corporate bonds (attach schedule) . . . . .			
	11 Investments—land, buildings, and equipment basis ► _____			
Less accumulated depreciation (attach schedule) ► _____				
12 Investments—mortgage loans . . . . .				
13 Investments—other (attach schedule) . . . . .	525,704	525,704	150,187	
14 Land, buildings, and equipment basis ► _____				
Less accumulated depreciation (attach schedule) ► _____				
15 Other assets (describe ► _____)	39,876	47,551	47,551	
<b>16 Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	10,200,950	9,890,438	11,454,489	
<b>Liabilities</b>	17 Accounts payable and accrued expenses . . . . .	48,826	45,493	
	18 Grants payable . . . . .			
	19 Deferred revenue . . . . .			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule) . . . . .			
	22 Other liabilities (describe ► _____)	59,500	31,000	
	<b>23 Total liabilities</b> (add lines 17 through 22) . . . . .	108,326	76,493	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow SFAS 117, check here ► <input checked="" type="checkbox"/></b> <b>and complete lines 24 through 26 and lines 30 and 31.</b>			
	24 Unrestricted . . . . .	10,092,624	9,813,945	
	25 Temporarily restricted . . . . .			
	26 Permanently restricted . . . . .			
	<b>Foundations that do not follow SFAS 117, check here ► <input type="checkbox"/></b> <b>and complete lines 27 through 31.</b>			
	27 Capital stock, trust principal, or current funds . . . . .			
	28 Paid-in or capital surplus, or land, bldg , and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	<b>30 Total net assets or fund balances</b> (see instructions) . . . . .	10,092,624	9,813,945	
	<b>31 Total liabilities and net assets/fund balances</b> (see instructions) . . . . .	10,200,950	9,890,438	

**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	10,092,624
2	Enter amount from Part I, line 27a . . . . .	2	-266,177
3	Other increases not included in line 2 (itemize) ► _____	3	0
4	Add lines 1, 2, and 3 . . . . .	4	9,826,447
5	Decreases not included in line 2 (itemize) ► _____	5	12,502
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	6	9,813,945

**Part IV Capital Gains and Losses for Tax on Investment Income**

List and describe the kind(s) of property sold (e.g., real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)		How acquired (b) P—Purchase D—Donation	Date acquired (c) (mo, day, yr)	Date sold (d) (mo, day, yr)
<b>1a</b>	See Additional Data Table			
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
<b>(e) Gross sales price</b>		<b>(f) Depreciation allowed (or allowable)</b>	<b>(g) Cost or other basis plus expense of sale</b>	<b>(h) (e) plus (f) minus (g)</b>
<b>a</b>	See Additional Data Table			
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
<b>(i) F M V as of 12/31/69</b>		<b>(j) Adjusted basis as of 12/31/69</b>	<b>(k) Excess of col (i) over col (j), if any</b>	
<b>a</b>	See Additional Data Table			
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
<b>2</b>	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		<b>2</b> 82,924
<b>3</b>	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)			
If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8				<b>3</b> -95,216

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?  
If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part

Yes  No

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

<b>(a)</b> Base period years Calendar year (or tax year beginning in)	<b>(b)</b> Adjusted qualifying distributions	<b>(c)</b> Net value of noncharitable-use assets	<b>(d)</b> Distribution ratio (col (b) divided by col (c))
2014	767,178	13,387,939	0 057304
2013	406,359	12,094,681	0 033598
2012	271,176	10,905,441	0 024866
2011	533,959	10,923,451	0 048882
2010	294,154	10,326,421	0 028486
<b>2</b> Total of line 1, column (d).			<b>2</b> 0 193136
<b>3</b> 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			<b>3</b> 0 038627
<b>4</b> Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.			<b>4</b> 12,396,135
<b>5</b> Multiply line 4 by line 3.			<b>5</b> 478,826
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b).			<b>6</b> 3,264
<b>7</b> Add lines 5 and 6.			<b>7</b> 482,090
<b>8</b> Enter qualifying distributions from Part XII, line 4.			<b>8</b> 607,341

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)**

1a	Exempt operating foundations described in section 4940(d)(2), check here ► <input type="checkbox"/> and enter "N/A" on line 1	1	3,264
	Date of ruling or determination letter _____ <b>(attach copy of letter if necessary—see instructions)</b>		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b . . . . .		
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) . . . . .	2	0
3	Add lines 1 and 2. . . . .	3	3,264
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) . . . . .	4	0
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3 If zero or less, enter -0- . . . . .	5	3,264
6	<b>Credits/Payments</b>		
a	2015 estimated tax payments and 2014 overpayment credited to 2015 . . . . .	6a	30,513
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	30,513
8	Enter any <b>penalty</b> for underpayment of estimated tax Check here <input type="checkbox"/> If Form 2220 is attached . . . . .	8	
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> . . . . . ►	9	
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> . . . . . ►	10	27,249
11	Enter the amount of line 10 to be <b>Credited to 2015 estimated tax</b> ► 27,249 <b>Refunded</b> ►	11	0

**Part VII-A Statements Regarding Activities**

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? . . . . .	<input type="checkbox"/>	<b>Yes</b>	<b>No</b>
1a		<input type="checkbox"/>	<b>No</b>	
1b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? . . . . .	<input type="checkbox"/>	<b>Yes</b>	<b>No</b>
	<i>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</i>			
1c	Did the foundation file <b>Form 1120-POL</b> for this year? . . . . .	<input type="checkbox"/>	<b>Yes</b>	<b>No</b>
1c		<input type="checkbox"/>	<b>No</b>	
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? . . . . .	<input type="checkbox"/>	<b>Yes</b>	<b>No</b>
	<i>If "Yes," attach a detailed description of the activities</i>			
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? <i>If "Yes," attach a conformed copy of the changes</i> . . . . .	<input type="checkbox"/>	<b>Yes</b>	<b>No</b>
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year? . . . . .	<input type="checkbox"/>	<b>Yes</b>	<b>No</b>
b	If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? . . . . .	<input type="checkbox"/>	<b>Yes</b>	<b>No</b>
4b		<input type="checkbox"/>	<b>No</b>	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . .	<input type="checkbox"/>	<b>Yes</b>	<b>No</b>
	<i>If "Yes," attach the statement required by General Instruction T</i>			
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? . . . . .	<input type="checkbox"/>	<b>Yes</b>	<b>No</b>
6		<input type="checkbox"/>	<b>No</b>	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i> . . . . .	<input type="checkbox"/>	<b>Yes</b>	<b>No</b>
7		<input type="checkbox"/>	<b>No</b>	
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? <i>If "No," attach explanation</i> . . . . .	<input type="checkbox"/>	<b>Yes</b>	<b>No</b>
8b		<input type="checkbox"/>	<b>No</b>	
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)? <i>If "Yes," complete Part XIV</i> . . . . .	<input type="checkbox"/>	<b>Yes</b>	<b>No</b>
9		<input type="checkbox"/>	<b>No</b>	
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i> . . . . .	<input type="checkbox"/>	<b>Yes</b>	<b>No</b>
10		<input type="checkbox"/>	<b>No</b>	

**Part VII-A Statements Regarding Activities (continued)**

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions). . . . .	11	No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions) . . . . .	12	No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ►N/A	13	Yes
14	The books are in care of ►ROBERTA HENDERSON Located at ►642 BOSTON POST RD SUDBURY MA	Telephone no ►(978) 443-9000 ZIP+4 ►01776	
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —Check here . . . . . ► <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year. . . . . ► 15		
16	At any time during calendar year 2015, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). If "Yes," enter the name of the foreign country ►	16	Yes No

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. . . . . (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)??. . . . . (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b	If any answer is "Yes" to 1a(1)–(6), did <b>any</b> 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	No
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	No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a	At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015?. . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
	If "Yes," list the years ► 20____, 20____, 20____, 20____		
b	Are there any years listed in 2a for which the foundation is <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 <b>all</b> years listed, answer "No" and attach statement—see instructions). . . . .	2b	
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 ► 20____, 20____, 20____, 20____		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b	If "Yes," did it have excess business holdings in 2015 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015). . . . .	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?	4b	No

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (Continued)****5a** During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

 Yes  No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? . . . . .

 Yes  No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

 Yes  No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). . . . .

 Yes  No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? . . . . .

 Yes  No**b** If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? . . . . .**5b****c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? . . . . . Yes  No*If "Yes," attach the statement required by Regulations section 53.4945-5(d)***6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? . . . . . Yes  No**6b****No****b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . . . .*If "Yes" to 6b, file Form 8870***7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  Yes  No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? . . . . .**7b****Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).**

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
AUGUSTA PETRONE	TRUSTEE 1 00	20,209	0	10,800
PO BOX 420 SUDBURY, MA 01776				
BARCLAY HENDERSON	TRUSTEE 1 00	20,209	0	0
PO BOX 420 SUDBURY, MA 01776				
ROBERTA HENDERSON	TRUSTEE 1 00	20,209	0	79,983
PO BOX 420 SUDBURY, MA 01776				

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

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

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

0

**Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**

**3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".**

## **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.

1	
2	
3	
4	

**Part IX-B Summary of Program-Related Investments (see instructions)**

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

1	<hr/> <hr/> <hr/>	
---	-------------------	--

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All other program-related investments. See instructions

3 \_\_\_\_\_

**Total:** Add lines 1 through 3

**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	10,745,133
b	Average of monthly cash balances. . . . .	1b	1,669,038
c	Fair market value of all other assets (see instructions). . . . .	1c	170,738
d	<b>Total</b> (add lines 1a, b, and c). . . . .	1d	12,584,909
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	12,584,909
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	4	188,774
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 Enter here and on Part V, line 4	5	12,396,135
6	<b>Minimum investment return.</b> Enter 5% of line 5. . . . .	6	619,807

**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	619,807
2a	Tax on investment income for 2015 from Part VI, line 5. . . . .	2a	3,264
b	Income tax for 2015 (This does not include the tax from Part VI ). . . . .	2b	
c	Add lines 2a and 2b. . . . .	2c	3,264
3	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	3	616,543
4	Recoveries of amounts treated as qualifying distributions. . . . .	4	0
5	Add lines 3 and 4. . . . .	5	616,543
6	Deduction from distributable amount (see instructions). . . . .	6	0
7	<b>Distributable amount</b> as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . . .	7	616,543

**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	607,341
b	Program-related investments—total from Part IX-B. . . . .	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes. . . . .	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required). . . . .	3a	
b	Cash distribution test (attach the required schedule). . . . .	3b	
4	<b>Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	607,341
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions). . . . .	5	3,264
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4. . . . .	6	604,077

**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
<b>1</b> Distributable amount for 2015 from Part XI, line 7				616,543
<b>2</b> Undistributed income, if any, as of the end of 2015			564,107	
<b>a</b> Enter amount for 2014 only. . . . .		0		
<b>b</b> Total for prior years 20____, 20____, 20____				
<b>3</b> Excess distributions carryover, if any, to 2015				
<b>a</b> From 2010. . . . .				
<b>b</b> From 2011. . . . .				
<b>c</b> From 2012. . . . .				
<b>d</b> From 2013. . . . .				
<b>e</b> From 2014. . . . .				
<b>f</b> <b>Total</b> of lines 3a through e. . . . .	0			
<b>4</b> Qualifying distributions for 2015 from Part XII, line 4 ► \$ 607,341			564,107	
<b>a</b> Applied to 2014, but not more than line 2a		0		
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .				
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
<b>d</b> Applied to 2015 distributable amount. . . . .				43,234
<b>e</b> Remaining amount distributed out of corpus	0			
<b>5</b> Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a) )	0			0
<b>6</b> <b>Enter the net total of each column as indicated below:</b>				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b. . . . .	0			
<b>c</b> 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			
<b>d</b> Subtract line 6c from line 6b Taxable amount—see instructions. . . . .	0			
<b>e</b> Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount—see instructions. . . . .	0			
<b>f</b> Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015. . . . .				573,309
<b>7</b> 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			
<b>8</b> Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions). . . . .	0			
<b>9</b> <b>Excess distributions carryover to 2016.</b> Subtract lines 7 and 8 from line 6a. . . . .	0			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2011. . . . .				
<b>b</b> Excess from 2012. . . . .				
<b>c</b> Excess from 2013. . . . .				
<b>d</b> Excess from 2014. . . . .				
<b>e</b> Excess from 2015. . . . .				

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

<b>1a</b> If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2015, enter the date of the ruling. . . . . ►				
<b>b</b> Check box to indicate whether the organization is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)				
<b>2a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed. . . . .				
<b>b</b> 85% of line 2a . . . . .				
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed. . . . .				
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities. . . . .				
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c . . . . .				
<b>3</b> Complete 3a, b, or c for the alternative test relied upon				
<b>a</b> "Assets" alternative test—enter				
(1) Value of all assets . . . . .				
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)				
<b>b</b> "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . . .				
<b>c</b> "Support" alternative test—enter				
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties). . . . .				
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(ii). . . . .				
(3) Largest amount of support from an exempt organization				
(4) Gross investment income				

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

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

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

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

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

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

ROBERTA HENDERSON  
PO BOX 420  
SUDBURY, MA 01776  
(978) 443-4646  
ROBERTAHENDERSON@COMCAST.NET

**b** The form in which applications should be submitted and information and materials they should include  
LETTER, INCLUDING REASON FOR NEED AND INTERNAL REVENUE SERVICE EXEMPTION

**c** Any submission deadlines

NONE

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

NONE

**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)				
<b>a Paid during the year</b> See Additional Data Table				
<b>Total . . . . .</b>			► 3a	563,000
<b>b Approved for future payment</b>				
<b>Total . . . . .</b>			► 3b	0

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) Related or exempt function income (See instructions )
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
<b>1</b> Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
<b>g</b> Fees and contracts from government agencies					
<b>2</b> Membership dues and assessments. . . . .					
<b>3</b> Interest on savings and temporary cash investments . . . . .	523000		14		79
<b>4</b> Dividends and interest from securities. . . .	523000		14		317,362
<b>5</b> Net rental income or (loss) from real estate					
a Debt-financed property. . . . .					
b Not debt-financed property. . . . .					
<b>6</b> Net rental income or (loss) from personal property . . . . .					
<b>7</b> Other investment income. . . . .	523000		01		136,562
<b>8</b> Gain or (loss) from sales of assets other than inventory . . . . .	523000		18		82,924
<b>9</b> Net income or (loss) from special events					
<b>10</b> Gross profit or (loss) from sales of inventory					
<b>11</b> Other revenue a CHANGE IN DEFERRED TAXES _____	900099		01		19,000
b _____					
c _____					
d _____					
e _____					
<b>12</b> Subtotal Add columns (b), (d), and (e). . .		0		555,927	0
<b>13</b> Total Add line 12, columns (b), (d), and (e). . .				555,927	

**12** Subtotal Add columns (b), (d), and (e). .

**13 Total.** Add line 12, columns (b), (d), and (e).

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

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



**Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d**

(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)
CREDIT SUISSE #7907		2015-01-01	2015-12-31
CREDIT SUISSE #3992		2015-01-01	2015-12-31
CREDIT SUISSE #3992		2014-01-01	2015-12-31
CREDIT SUISSE #8666		2015-01-01	2015-12-31
CREDIT SUISSE #8674		2015-01-01	2015-12-31
SCHWAB #8343		2014-01-01	2015-12-31
SCHWAB #2505		2015-01-01	2015-12-31
SCHWAB #2505		2014-01-01	2015-12-31
DEUTSCHE #7791		2014-01-01	2015-12-31
DEUTSCHE #2564		2014-01-01	2015-12-31

**Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h**

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis (h) plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
20,646		24,165	-3,519
3,612,879		3,696,161	-83,282
1,711,955		1,512,523	199,432
75,575		78,880	-3,305
26,332		28,355	-2,023
328,545		278,495	50,050
43,800		46,887	-3,087
872,306		896,996	-24,690
24,806		90,168	-65,362
136,820		118,110	18,710

**Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l**

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) FMV as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) over col (j), if any (k)	
			-3,519
			-83,282
			199,432
			-3,305
			-2,023
			50,050
			-3,087
			-24,690
			-65,362
			18,710

## Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b>				
ACCURACY IN MEDIA 4455 CONNECTICUT AVE NW SUITE 330 WASHINGTON, DC 20008		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	1,000
ALBERT & MARY LASKER FOUNDATION 110 EAST 42ND ST SUITE 1300 NEW YORK, NY 10017		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	5,000
ALL NEWTON SCHOOL OF MUSIC 321 CHESTNUT ST WEST NEWTON, MA 02465		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	10,000
AMERICAN AGRI-WOMEN RESOURCE CENTER 5910 NORTH SHARY ROAD MISSION, TX 78574		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	5,000
AMERICAN FOREIGN POLICY COUNCIL 509 C STREET NE WASHINGTON, DC 20002		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	13,000
ANCHORAGE NEIGHBORHOOD HEALTH CARE PO BOX 201849 ANCHORAGE, AK 99520		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	1,000
BARD COLLEGE PO BOX 5000 ANNANDALE, NY 12504		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	5,000
BAY PATH ELDER SERVICES 354 WAVERLY STREET FRAMINGHAM, MA 01702		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	2,000
BELMONT HILL SCHOOL 350 PROSPECT ST BELMONT, MA 02178		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	11,000
BOSTON LIVING CENTER 29 STANHOPE ST BOSTON, MA 02116		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	1,000
BOSTON WOODWIND SOCIETY PO BOX 470413 BROOKLINE, MA 02447		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	10,000
BOY SCOUTS OF AMERICA 490 UNION AVE FRAMINGHAM, MA 01702		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	5,000
BOYS & GIRLS CLUB 169 PLEASANT ST MARLBORO, MA 01752		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	2,000
CAPITAL RESEARCH CENTER 1513 16TH NW WASHINGTON, DC 20036		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	5,000
CATO INSTITUTE 1000 MASSACHUSETTS AVE NW WASHINGTON, DC 20001		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	1,000
<b>Total . . . . .</b>			<b>► 3a</b>	<b>563,000</b>

## Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b>				
CENTER FOR MILITARY READINESS PO BOX 51600 LIVONIA, MI 48151		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	1,000
CENTER FOR SECURITY POLICY 2300 M ST NW SUITE 600 WASHINGTON, DC 20037		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	7,000
CENTERS FOR A CONSTRUCTIVE TOMORROW 410 FIRST STREET SE WASHINGTON, DC 20003		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	8,000
CHESHIRE HEALTH FOUNDATION 580 COURT STREET KEENE, NH 03431		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	3,000
COMPETITIVE ENTERPRISE INSTITUTE 1899 L STREET NW 12TH FL WASHINGTON, DC 20036		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	4,000
CONNECTICUT COLLEGE 270 MOHEGAN AVE NEW LONDON, CT 06320		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	5,000
DARTMOUTH COLLEGE 6066 DEVELOPMENT OFFICE HANOVER, NH 03755		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	20,000
DAVID HAROWITZ FREEDOM CENTER 4401 WILSHIRE BLVD 4TH FL LOS ANGELES, CA 90010		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	7,000
DEFENSE FORUM FOUNDATION 3014 CASTLE RD FALLS CHURCH, VA 22044		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	1,000
DOCTORS WITHOUT BORDERS PO BOX 5023 HAGERSTOWN, MD 21741		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	1,000
DR MARTIN LUTHER KING JR SCHOOL 102 PUTNAM AVE CAMBRIDGE, MA 02139		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	9,000
DUBLIN CHRISTIAN ACADEMY PO BOX 1037 DUBLIN, NH 03444		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	2,000
EMERSON HOSPITAL 133 OLD ROAD TO NINE ACRE CORNER CONCORD, MA 01742		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	1,000
FRANCIS SMALL HERITAGE TRUST PO BOX 414 LIMERICK, ME 04048		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	2,300
FRIENDS OF HAPPY HEART FARM 2820 WEST ELIZABETH STREET FORT COLLINS, CO 80521		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	2,000
<b>Total . . . . .</b>				563,000
			► 3a	

## Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a Paid during the year</b>				
HANOVER THEATRE 2 SOUTHBRIDGE STREET WORCESTER, MA 01608		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	2,000
HERITAGE FOUNDATION 214 MASSACHUSETTS AVE NE WASHINGTON, DC 20002		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	7,000
HILLSDALE COLLEGE 33 E COLLEGE HILLSIDE, MI 49242		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	4,000
HUDSON INSTITUTE INC QUAKER RIDGE ROAD CROTONONHUDSON, NY 10520		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	5,000
INSTITUTE FOR ENGERY RESEARCH 6219 OLYMPIA HOUSTON, TX 77057		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	6,000
INSTITUTE FOR INTERNATIONAL EDUCATION 809 UNITED NATIONS PLAZA 6TH FLOOR NEW YORK, NY 10017		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	25,000
INSTITUTE FOR THE ANALYSIS OF GLOBAL SECURITY 809 UNITED NATIONS PLAZA 6TH FLOOR NEW YORK, NY 10017		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	7,500
INSTITUTE FOR THE STUDY OF WAR 1900 M ST NW SUITE 810 WASHINGTON, DC 20036		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	10,000
INTER-COLLEGIATE STUDIES INSITUTE 3901 CENTERVILLE RD WILMINGTON, DE 19807		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	6,000
INTERNATIONAL COMMITTEE AGAINST MENTAL ILLNESS PO BOX 2665 WESTFIELD, NJ 07091		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	12,000
ITHACA COLLEGE 953 DANBY RD ITHACA, NY 14850		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	22,000
JAMES JAY DUDLEY LUCE FOUNDATION 540 MAIN STREET SUITE 418 NEW YORK, NY 10044		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	15,000
JEWISH FAMILY SERVICES 475 FRANKLIN ST SUITE 101 FRAMINGHAM, MA 01702		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	1,000
JOSIAH BARTLETT CENTER 409 S 18TH ST ST JOSEPH, MO 64501		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	3,000
KENNEDY KRIEGER FOUNDATION 707 N BROADWAY BALTIMORE, MD 21205		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	5,000
<b>Total . . . . .</b>				563,000
			► 3a	

## Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b>				
LEADERSHIP INSTITUTE 1101 N HIGHLAND ST ARLINGTON, VA 22201		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	8,000
LOOMIS CHAFFEE SCHOOL 4 BATCHELDER RD WINDSOR, CT 06095		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	5,000
MAINE STATE BALLET PO BOX 10370 PORTLAND, ME 04104		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	2,500
MAKE A WISH FOUNDATION 1 BULLFINCH PLACE SECOND FLOOR BOSTON, MA 02114		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	1,000
MARLBOROUGH HOSPITAL 157 UNION ST MARLBORO, MA 01752		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	1,000
MCGOVERN INSITUTE 77 MASSACHUSETTE AVE CAMBRIDGE, MA 02139		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	2,000
MEDIA RESEARCH CENTER 1900 CAMPUS DRIVE SUITE 600 RESTON, VA 20191		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	1,000
MERCATUS CENTER 4084 UNIVERSITY DR SUITE 208 FAIRFAX, VA 22030		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	1,000
MINUTEMAN ELDER SERVICES 26 CROSBY DR BEDFORD, MA 01730		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	2,000
MONADNOCK COMMUNITY HOSPITAL 452 OLD STREET RD PETERSBOROUGH, NH 03458		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	5,000
MT AUBURN HOSPITAL 330 MOUNT AUBURY ST CAMBRIDGE, MA 02138		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	22,000
NATIONAL ACADEMY OF SCIENCES 2101 CONSTITUTION AVE NW WASHINGTON, DC 20418		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	10,000
NATIONAL RIGHT TO READ FOUNDATION PO BOX 560 STRASBURG, VA 22657		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	1,000
NATIONAL STROKE ASSOCIATION 9707 E EASTER LANE SUITE B CENTENNIAL, CO 80112		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	1,000
NEADS 305 REDEMPTION ROCK TRAIL PRINCETON, MA 01541		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	5,000
<b>Total . . . . .</b>			<b>► 3a</b>	<b>563,000</b>

## Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b>				
NEWTON WELLESLEY HOSPITAL 2014 WASHINGTON ST NEWTON, MA 02462		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	10,000
NORTHEASTERN UNIVERSITY 120 KNOWLES CENTER BOSTON, MA 02115		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	5,000
NORTHWOOD UNIVERSITY 3225 COOK ROAD MIDLAND, MI 48640		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	1,000
OPEN STAGE THEATRE COMPANY PO BOX 617 FORT COLLINS, CO 80522		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	5,250
OPERA FORT COLLINS 525 WHEDBEE ST FORT COLLINS, CO 80524		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	5,250
PLANNED PARENTHOOD 434 WEST 33RD ST NEW YORK, NY 10001		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	2,000
PUBLIC RADIO FOR THE FRONT RANGE 619 SOUTH COLLEG AVE SUITE 4 FORT COLLINS, CO 80524		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	5,250
QUEST CENTER FOR INTEGRATIVE HEALTH 2901 E BURNSIDE PORTLAND, OR 97214		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	23,000
RECOVERY CAFE PO BOX 2373 EVERETT, WA 98213		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	5,000
RECOVERY WITHOUT WALLS PO BOX 591 WEST FALMOUTH, MA 02574		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	2,000
ROSALIND FRANKLIN SOCIETY 140 HUGUENOT STREET 3RD FLOOR NEW ROCHELLE, NY 10801		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	2,500
SALK INSTITUTE FOR BIOLOGICAL STUDIES PO BOX 85800 SAN DIEGO, CA 92186		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	5,000
SALVATION ARMY 25 SHAWMUT ROAD CANTON, MA 02021		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	15,000
SAVE THE POUDRE WATERKEEPER PO BOX 20 FORT COLLINS, CO 80522		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	5,250
SEATTLE URBAN SQUASH 921 82ND STREET SEATTLE, WA 98103		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	1,000
<b>Total . . . . .</b>				<b>► 3a</b> 563,000

## Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b>				
SELOUS FOUNDATION 325 PENNSYLVANIE AVE SE WASHINGTON, DC 20003		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	1,000
SENS FOUNDATION 110 PIONEER WAY SUITE J MOUNTAIN VIEW, CA 94041		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	1,000
SHADY HILL SCHOOL 178 COOLIDGE HILL CAMBRIDGE, MA 02138		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	4,000
SPECIAL OLYMPICS MASS INC 512 FOREST STREET MARLBORO, MA 01752		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	1,000
ST GABRIEL SCHOOL 379 BROAD ST WINDSOR, CT 06095		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	5,000
STATE POLICY NETWORK 1655 N FORT MYER DR SUITE 360 ARLINGTON, VA 22209		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	4,000
SWEET BRIAR INSTITUTE PO BOX A SWEET BRIAR, VA 24595		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	2,000
THE AMERICAN STUDIES CENTER 1100 N GLEBE RD STE 900 ARLINGTON, MA 22201		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	2,000
THE DUBLIN SCHOOL PO BOX 522 DUBLIN, NH 03444		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	1,000
THE FISHER HOUSE 111 ROCKVILLE PIKE SUITE 420 ROCKVILLE, MD 20850		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	2,000
THE FOUNDATION ENDOWMENT 611 CAMERON STREET ALEXANDRIA, VA 22314		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	1,000
THE FUND FOR AMERICA'S STUDIES 1706 NEW HAMPSHIRE AVE NW WASHINGTON, DC 20009		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	3,000
THE INSITUTE OF WORLD POLITICS 1521 16TH STREET NW WASHINGTON, DC 20036		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	6,000
UNIVERSITY OF DENVER COLORADO SEMINARY 2301 S GAYLON ST UNIVERSITY HALL RM 102 DENVER, CO 80208		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	23,000
WALDORF SCHOOL OF GARDEN CITY CAMBRIDGE AVENUE GARDEN CITY, NJ 11530		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	2,500
<b>Total . . . . .</b>				563,000
			► 3a	

## Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a Paid during the year</b>				
WELLESLEY COLLEGE 106 CENTRAL STREET WELLESLEY, MA 02481		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	6,000
WELLESLEY COMMUNITY CENTER 219 WASHINGTON ST WELLESLEY, MA 02481		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	33,000
WELLS COLLEGE 170 MAIN STREET AURORA, NY 13026		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	5,000
WEST END HOUSE GIRLS CAMP 105 ALLSTON ST ALLSTON, MA 02134		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	5,000
WILLOWBROOK AT NEWFIELD RESTORATION PO BOX 28 NEWFIELD, ME 04056		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	10,700
WORLD BOSTON 212 NORTHERN AVENUE E BUILDING 1 BOSTON, MA 02210		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	2,000
WOUNDED WARRIOR PO BOX 758540 TOPEKA, KS 66675		501(C)3	TO FURTHER THE ORGANIZATION'S TAX EXEMPT PURPOSE	2,000
<b>Total . . . . .</b>			<b>► 3a</b>	<b>563,000</b>

## TY 2015 Accounting Fees Schedule

**Name:** HENDERSON FOUNDATION

C/O ROBERTA HENDERSON

**EIN:** 04-6051095

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	17,100	15,390	0	1,710

**TY 2015 Applied to Prior Year Election**

**Name:** HENDERSON FOUNDATION

C/O ROBERTA HENDERSON

**EIN:** 04-6051095

**Election:** UNDER REG SEC 53.4942(A), THE HENDERSON FOUNDATION IS  
APPLYING THE EXCESS DISTRIBUTION TO PRIOR YEAR  
UNDISTRIBUTED INCOME.

## TY 2015 Investments Corporate Stock Schedule

**Name:** HENDERSON FOUNDATION

C/O ROBERTA HENDERSON

**EIN:** 04-6051095

Name of Stock	End of Year Book Value	End of Year Fair Market Value
EQUITY INVESTMENTS	8,317,450	10,257,018

## TY 2015 Investments - Other Schedule

**Name:** HENDERSON FOUNDATION

C/O ROBERTA HENDERSON

**EIN:** 04-6051095

<b>Category/ Item</b>	<b>Listed at Cost or FMV</b>	<b>Book Value</b>	<b>End of Year Fair Market Value</b>
INVESTMENTS IN PARTNERSHIPS	AT COST	525,704	150,187

## TY 2015 Other Assets Schedule

**Name:** HENDERSON FOUNDATION

C/O ROBERTA HENDERSON

**EIN:** 04-6051095

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
DIVIDEND RECEIVABLE	28,095	8,770	8,770
OTHER ASSETS	11,781	11,781	11,781
PREPAID FEDERAL INCOME TAXES	0	27,000	27,000

## TY 2015 Other Decreases Schedule

**Name:** HENDERSON FOUNDATION

C/O ROBERTA HENDERSON

**EIN:** 04-6051095

Description	Amount
CHANGE IN PARTNERSHIP ACTIVITY	12,502

## TY 2015 Other Expenses Schedule

**Name:** HENDERSON FOUNDATION

C/O ROBERTA HENDERSON

**EIN:** 04-6051095

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BOOKKEEPING AND OFFICE	86,966	78,269	0	8,778
INVESTMENT FEES	74,126	74,126	0	0
OTHER EXPENSE	3,957	81	0	1,540

## TY 2015 Other Income Schedule

**Name:** HENDERSON FOUNDATION

C/O ROBERTA HENDERSON

**EIN:** 04-6051095

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
INCOME FROM PARTNERSHIP	136,562	136,562	0
CHANGE IN DEFERRED TAXES	19,000		19,000

## TY 2015 Other Liabilities Schedule

**Name:** HENDERSON FOUNDATION

C/O ROBERTA HENDERSON

**EIN:** 04-6051095

Description	Beginning of Year - Book Value	End of Year - Book Value
FEDERAL AND STATE TAXES PAYABLE	9,500	0
DEFERRED TAXES	50,000	31,000

## TY 2015 Taxes Schedule

**Name:** HENDERSON FOUNDATION

C/O ROBERTA HENDERSON

**EIN:** 04-6051095

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX	12,646	12,646	0	0
OTHER TAXES	934	0	0	0
TAX ON NET INVESTMENT INCOME	3,264	0	0	0