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Form **990-PF****Return of Private Foundation**
or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

2015Department of the Treasury
Internal Revenue Service▶ Do not enter social security numbers on this form as it may be made public.
▶ Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

Open to Public Inspection

For calendar year 2015 or tax year beginning

, and ending

Name of foundation ABBOT & DOROTHY H. STEVENS FOUNDATION		A Employer identification number 04-6107991
Number and street (or P.O. box number if mail is not delivered to street address) P.O. BOX 111	Room/suite	B Telephone number (see instructions) 978-688-7211
City or town, state or province, country, and ZIP or foreign postal code NORTH ANDOVER MA 01845		C If exemption application is pending, check here ☐
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1 Foreign organizations, check here ☐ 2 Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 23,769,118 (Part I, column (d) must be on cash basis)	J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify)	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) (see instructions))	(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 (attach schedule)				
2	Check ☒ if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	491,979	491,979		
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	1,929,023			
b	Gross sales price for all assets on line 6a	7,042,445			
7	Capital gain net income (from Part IV, line 2)		1,929,023		
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) STMT 1	8,694	7,147		
12	Total. Add lines 1 through 11	2,429,696	2,428,149	0	
13	Compensation of officers, directors, trustees, etc	0			
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule)				
b	Accounting fees (attach schedule) STMT 2	8,275			8,275
c	Other professional fees (attach schedule) STMT 3	97,945	97,945		
17	Interest	1	1		
18	Taxes (attach schedule) (see instructions) STMT 4	51,210	10,211		
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses (att sch) STMT 5	83,398	18,398		65,000
24	Total operating and administrative expenses. Add lines 13 through 23	240,829	126,555	0	73,275
25	Contributions, gifts, grants paid	1,146,850			1,146,850
26	Total expenses and disbursements. Add lines 24 and 25	1,387,679	126,555	0	1,220,125
27	Subtract line 26 from line 12				
a	Excess of revenue over expenses and disbursements	1,042,017			
b	Net investment income (if negative, enter -0-)		2,301,594		
c	Adjusted net income (if negative, enter -0-)			0	

For Paperwork Reduction Act Notice, see instructions.

Form **990-PF** (2015)

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash – non-interest-bearing		10,183	34,060	34,059
	2	Savings and temporary cash investments		655,837	308,084	308,084
	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 ▶	0			
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments – U S and state government obligations (attach schedule) STMT 6		499,854		
	b	Investments – corporate stock (attach schedule) SEE STMT 7		18,314,125	13,677,274	15,844,600
	c	Investments – corporate bonds (attach schedule) SEE STMT 8		1,145,124	7,647,722	7,582,375
	11	Investments – land, buildings, and equipment basis ▶				
	Less accumulated depreciation (attach sch) ▶					
12	Investments – mortgage loans					
13	Investments – other (attach schedule)					
14	Land, buildings, and equipment basis ▶					
	Less accumulated depreciation (attach sch) ▶					
15	Other assets (describe ▶)					
16	Total assets (to be completed by all filers – see the instructions Also, see page 1, item I)		20,625,123	21,667,140	23,769,118	
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	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		20,625,123	21,667,140	
	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				
	28	Paid-in or capital surplus, or land, bldg, and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
	30	Total net assets or fund balances (see instructions)		20,625,123	21,667,140	
	31	Total liabilities and net assets/fund balances (see instructions)		20,625,123	21,667,140	

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	20,625,123
2	Enter amount from Part I, line 27a	2	1,042,017
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	21,667,140
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	21,667,140

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	BBH ACCT#0540 FORM 1099-B ATTACHED	P	VARIOUS	VARIOUS
b	BBH ACCT#0540 FORM 1099-B ATTACHED	P	VARIOUS	VARIOUS
c	BBH FORM 1099-DIV			
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 2,313,016		1,805,040	507,976
b 4,687,972		3,308,382	1,379,590
c 41,457			41,457
d			
e			

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			507,976
b			1,379,590
c			41,457
d			
e			

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	1,929,023
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

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

☐ Yes ☒ No

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

1 Enter the appropriate amount in each column for each year, see 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	1,210,850	25,315,994	0.047829
2013	1,305,468	24,050,704	0.054280
2012	943,533	21,781,340	0.043318
2011	1,051,400	20,940,084	0.050210
2010	971,750	19,867,180	0.048912

2 Total of line 1, column (d)	2	0.244549
3 Average distribution ratio for the 5-year base period – divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.048910
4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5	4	24,595,483
5 Multiply line 4 by line 3	5	1,202,965
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	23,016
7 Add lines 5 and 6	7	1,225,981
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions	8	1,455,125

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	23,016
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2	3	23,016
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	23,016
6	Credits/Payments		
a	2015 estimated tax payments and 2014 overpayment credited to 2015	6a	33,600
b	Exempt foreign organizations – tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	28,000
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	61,600
8	Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	53
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	38,531
11	Enter the amount of line 10 to be Credited to 2016 estimated tax 12,000 Refunded	11	26,531

Part VII-A Statements Regarding Activities

	Yes	No
1a		X
b		X
c		X
d		
e		
2		X
3		X
4a		X
4b		X
5		X
6	X	
7	X	
8a		
8b	X	
9		X
10		X

N/A

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	Yes	No
				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 ► JOSHUA L. MINER P.O. BOX 111 Located at ► NORTH ANDOVER MA ZIP+4 ► 01845 Telephone no ► 978-688-7211			
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			
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	Yes	No
				X

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly)		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ 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 N/A ☒	1b	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2015?	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? If "Yes," list the years ► 20 , 20 , 20 , 20 ☐ Yes ☒ No		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement – see instructions) N/A	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20 , 20 , 20 , 20		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ 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?	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?	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 (see instructions).

(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
JOSHUA L. MINER	BOXFORD	TRUSTEE			
356 MAIN STREET	MA 01921	1.00	0	0	0
DEBORAH D. PUTNAM	ROSLINDALE	TRUSTEE			
32 ARBOROUGH ROAD	MA 02131	1.00	0	0	0
CHRISTOPHER W. ROGERS	NAHANT	TRUSTEE			
46 OCEAN STREET	MA 01908	1.00	0	0	0

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	(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 (see instructions). If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
BROWN BROTHERS HARRIMAN 40 WATER STREET BOSTON MA 02110	INVESTMENT ADVI	97,682
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 (see instructions)

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

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	

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	24,322,662
b	Average of monthly cash balances	1b	647,372
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	24,970,034
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	24,970,034
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	374,551
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	24,595,483
6	Minimum investment return. Enter 5% of line 5	6	1,229,774

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	1,229,774
2a	Tax on investment income for 2015 from Part VI, line 5	2a	23,016
b	Income tax for 2015 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	23,016
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,206,758
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	1,206,758
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	1,206,758

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. – total from Part I, column (d), line 26	1a	1,220,125
b	Program-related investments – total from Part IX-B	1b	
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	235,000
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	1,455,125
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	23,016
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,432,109

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				1,206,758
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2015				
a From 2010				
b From 2011				33,838
c From 2012				
d From 2013				138,893
e From 2014				
f Total of lines 3a through e	172,731			
4 Qualifying distributions for 2015 from Part XII, line 4 ▶ \$ 1,455,125				
a Applied to 2014, but not more than line 2a				
b Applied to undistributed income of prior years (Election required – see instructions)				
c Treated as distributions out of corpus (Election required – see instructions)				
d Applied to 2015 distributable amount				1,206,758
e Remaining amount distributed out of corpus	248,367			
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	421,098			
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount – see instructions				
e Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount – see instructions				
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)				
8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a	421,098			
10 Analysis of line 9				
a Excess from 2011				33,838
b Excess from 2012				
c Excess from 2013				138,893
d Excess from 2014				
e Excess from 2015				248,367

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2015, enter the date of the ruling ▶

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

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

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year – see instructions.)

1 Information Regarding Foundation Managers:

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

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
N/A

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
JOSHUA L. MINER 978-688-7211
P.O. BOX 111 NORTH ANDOVER MA 01845

b The form in which applications should be submitted and information and materials they should include
SEE ATTACHED STATEMENT

c Any submission deadlines
SEE ATTACHED STATEMENT

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

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

Recipient		If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)					
a Paid during the year SEE ATTACHED SCHEDULE		UNRELATED	501 (C) (3) CHARITABLE PURPOSE		1,146,850
Total				► 3a	1,146,850
b Approved for future payment SEE STATEMENT 9					150,000
Total				► 3b	150,000

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

- 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
 - (2)** Other assets
- b** Other transactions
- (1)** Sales of assets to a noncharitable exempt organization
 - (2)** Purchases of assets from a noncharitable exempt organization
 - (3)** Rental of facilities, equipment, or other assets
 - (4)** Reimbursement arrangements
 - (5)** Loans or loan guarantees
 - (6)** Performance of services or membership or fundraising solicitations
- c** Sharing of facilities, equipment, mailing lists, other assets, or paid employees
- 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.

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

[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

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

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.

**Sign
Here**


Signature of officer or trustee

10/26/2016
Date

TRUSTEE

Title

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

**Paid
Preparer
Use Only**

Print/Type preparer's name

KEVIN A. SULLIVAN

Preparer's signature

KEVIN A. SULLIVAN

Date _____

09/21/16

Check ☐ if self-employed

Firm's name ▶ **ABEL, ROGERS & SULLIVAN**

PTIN P00001560

Firm's address ► **1 CORPORATE DR
ANDOVER, MA 01810**

Firm's EIN ▶ 04-3073222

Phone no **978-975-3919**

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 11 - Other Income

Description	Revenue per Books	Net Investment Income	Adjusted Net Income
BBH K-1 ST CAPITAL GAIN	\$ 7,147	\$ 7,147	\$
CLASS ACTION PROCEEDS	4,123		
BBH WEALTH STRATEGIES K-1S	-2,576		
TOTAL	\$ 8,694	\$ 7,147	\$ 0

Statement 2 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
	\$ 8,275	\$	\$	\$ 8,275
TOTAL	\$ 8,275	\$ 0	\$ 0	\$ 8,275

Statement 3 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
INVESTMENT EXPENSES	\$ 97,945	\$ 97,945	\$	\$
TOTAL	\$ 97,945	\$ 97,945	\$ 0	\$ 0

Statement 4 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
FEDERAL TAX	\$ 40,749	\$	\$	\$
STATE FILING FEE	250			
FOREIGN TAX	9,734	9,734		
BBH K-1S FOREIGN TAX	477	477		
TOTAL	\$ 51,210	\$ 10,211	\$ 0	\$ 0

Federal Statements

Statement 5 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXPENSES				
OFFICE EXPENSE	60,000			60,000
BBH K-1S 2% FLOOR DEDUCTIONS	18,398	18,398		
DUES & SUBSCRIPTIONS	5,000			5,000
TOTAL	<u>\$ 83,398</u>	<u>\$ 18,398</u>	<u>\$ 0</u>	<u>\$ 65,000</u>

Statement 6 - Form 990-PF, Part II, Line 10a - US and State Government Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
US TREASURY OBLIGATIONS	<u>\$ 499,854</u>	<u>\$</u>	COST	<u>\$</u>
TOTAL	<u>\$ 499,854</u>	<u>\$ 0</u>		<u>\$ 0</u>

Statement 7 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
CORPORATE EQUITIES	<u>\$ 18,314,125</u>	<u>\$ 13,677,274</u>	COST	<u>\$ 15,844,600</u>
TOTAL	<u>\$ 18,314,125</u>	<u>\$ 13,677,274</u>		<u>\$ 15,844,600</u>

Statement 8 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
CORPORATE BONDS	<u>\$ 1,145,124</u>	<u>\$ 7,647,722</u>	COST	<u>\$ 7,582,375</u>
TOTAL	<u>\$ 1,145,124</u>	<u>\$ 7,647,722</u>		<u>\$ 7,582,375</u>

Form 990-PF, Part XV, Line 2b - Application Format and Required Contents

Description

SEE ATTACHED STATEMENT

Form 990-PF, Part XV, Line 2c - Submission Deadlines

Description

SEE ATTACHED STATEMENT

Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations

Description

SEE ATTACHED STATEMENT

Federal Statements

Statement 9 - Form 990-PF, Part XV, Line 3b - Grants and Contributions Approved for
Future Pmt

Name		Address		Status	Purpose	Amount
Address	Relationship					
THOMPSON ISLAND OUTWARD BOSTON MA 02127	UNRELATED	PO BOX 127	501(C)(3)	CONNECTIONS PROGRAM SUPPORT	15,000	
LAWRENCE COMMUNITY WORKS LAWRENCE MA 01841	UNRELATED	168 NEWBURY STREET	501(C)(3)	WORKING CITIES PROJECT SUPPORT	110,000	
ESSEX COUNTY COMMUNITY FOUNDATION DANVERS MA 01923	UNRELATED	175 ANDOVER STREET SUITE	501(C)(3)	HIRING OF A FUNDRAISING STAFF MEMBER	20,000	
GIRLS, INC LOWELL MA 01852	UNRELATED	220 WORTHEN STREET	501(C)(3)	STEM PROGRAMMING FOR LOWELL GIRLS	5,000	
TOTAL					150,000	

2015 Tax Information Statement

Recipient's Name and Address:
 ABBOT & DOROTHY H STEVENS FDN
 1 JOHNSON ST
 NORTH ANDOVER, MA 01845

Account Number: 1015010540
Recipient's Tax ID Number: XX-XXX7991
Payer's Federal ID Number: 06-1798398
Payer's State ID Number: MA

Payer's Name and Address:
 BROWN BROTHERS HARRIMAN
 140 BROADWAY
 NEW YORK, NY 10005

State: MA
Questions? (201)418-5859
☐ Corrected ☐ FATCA ☐ 2nd TIN notice

Reported to the IRS is proceeds less commissions and option premiums.
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Description of property (Box 1a)			Form 8949		Code		Adjustments		Net Gain or Loss		Federal Income Tax Withheld (Box 4)		State Tax Withheld (Box 16)	
CUSIP Number	Date Sold or Disposed (Box 1c)	Date Acquired (Box 1b)	Checkbox	Other Basis (Box 1e)	Proceeds (Box 1d)	if any (Box 1f)	Cost or Other Basis (Box 1e)	Adjustments (Box 1g)	Net Gain or Loss	Tax Withheld (Box 4)	Tax Withheld (Box 4)	Tax Withheld (Box 4)	Tax Withheld (Box 16)	Tax Withheld (Box 16)
315.0	CHUBB CORP													
171232101	07/02/2015	07/19/2007	E	16,472.71	38,591.23			0.00	22,118.52	0.00	0.00	0.00	0.00	0.00
592.0	CHUBB CORP													
171232101	07/16/2015	07/19/2007	E	30,958.22	72,223.55			0.00	41,265.33	0.00	0.00	0.00	0.00	0.00
783.0	CHUBB CORP													
171232101	07/22/2015	Various	E	40,544.50	96,220.46			0.00	55,675.96	0.00	0.00	0.00	0.00	0.00
1900.0	CHUBB CORP													
171232101	07/31/2015	Various	E	97,326.34	237,499.43			0.00	140,173.09	0.00	0.00	0.00	0.00	0.00
200.0	CHUBB CORP													
171232101	09/25/2015	Various	E	9,251.22	24,437.54			0.00	15,186.33	0.00	0.00	0.00	0.00	0.00
75.0	CHUBB CORP													
171232101	11/02/2015	10/16/2008	E	3,106.50	9,732.65			0.00	6,626.15	0.00	0.00	0.00	0.00	0.00
128.0	CHUBB CORP													
171232101	11/03/2015	10/16/2008	E	5,301.76	16,594.45			0.00	11,292.69	0.00	0.00	0.00	0.00	0.00
77.0	CHUBB CORP													
171232101	11/05/2015	10/16/2008	E	3,189.34	9,967.90			0.00	6,778.56	0.00	0.00	0.00	0.00	0.00
81.0	CHUBB CORP													
171232101	11/11/2015	10/16/2008	E	3,355.02	10,485.51			0.00	7,130.49	0.00	0.00	0.00	0.00	0.00

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2015 Tax Information Statement

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ABOT & DOROTHY H STEVENS FDN
1 JOHNSON ST
NORTH ANDOVER, MA 01845

Account Number: 1015010540

Recipient's Tax ID Number: XX-XXX7991

Payer's Federal ID Number: 06-1798398

Payer's State ID Number: MA

State: (201)418-5859

☐ Corrected ☐ FATCA ☐ 2nd TIN notice

Payer's Name and Address:

BROWN BROTHERS HARRIMAN
140 BROADWAY
NEW YORK, NY 10005

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Description of property (Box 1a)

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139.0	CHUBB CORP									
171232101	11/17/2015	10/16/2008	E	18,024.62	5,757.38		0.00	12,267.24	0.00	0.00
1300.0	COMCAST CORP CL A									
20030N101	09/25/2015	08/01/2007	E	73,146.01	33,619.43		0.00	39,526.58	0.00	0.00
2000.0	COMCAST CORP CL A									
20030N101	11/03/2015	Various	E	124,963.70	50,609.08		0.00	74,354.62	0.00	0.00
3700.0	COMCAST CORP CL A									
20030N101	12/03/2015	Various	E	220,404.94	83,249.15		0.00	137,155.79	0.00	0.00
700.0	DENTSPLY INTL INC									
249030107	09/25/2015	11/21/2008	E	36,189.82	17,414.11		0.00	18,775.71	0.00	0.00
200.0	DENTSPLY INTL INC									
249030107	10/05/2015	11/21/2008	E	10,377.80	4,975.46		0.00	5,402.34	0.00	0.00
61.0	EBAY INC									
278642103	09/25/2015	09/02/2010	E	1,541.14	593.12		0.00	948.02	0.00	0.00
100000.0	METLIFE INC 5% 06/15/2015									
59156RAN8	06/15/2015	03/07/2011	E	100,000.00	100,000.00		0.00	0.00	0.00	0.00
1100.0	MICROSOFT CORP									
594918104	10/05/2015	07/10/2007	E	51,327.03	32,978.00		0.00	18,349.03	0.00	0.00

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2015 Tax Information Statement

Page 15 of 36

Account Number: 1015010540
 Recipient's Tax ID Number: XX-XXX7991
 Payer's Federal ID Number: 06-1798398
 Payer's State ID Number: MA
 State: (201)418-5859
 Questions? ☐ Corrected ☐ FATCA ☐ 2nd TIN notice

Recipient's Name and Address:
 ABBOT & DOROTHY H STEVENS FDN
 1 JOHNSON ST
 NORTH ANDOVER, MA 01845

Payer's Name and Address:
 BROWN BROTHERS HARRIMAN
 140 BROADWAY
 NEW YORK, NY 10005

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3400.0	MICROSOFT CORP													
594918104	10/23/2015	10/08/2008	E	180,172.88	79,087.06		0.00	101,085.82	0.00	0.00				
1500.0	NESTLE S A SPONS ADR													
641069406	09/25/2015	04/20/2004	E	110,151.23	37,956.00		0.00	72,195.23	0.00	0.00				
1300.0	NESTLE S A SPONS ADR													
641069406	10/05/2015	04/20/2004	E	99,448.16	32,895.20		0.00	66,552.96	0.00	0.00				
2400.0	NESTLE S A SPONS ADR													
641069406	10/20/2015	04/20/2004	E	184,940.59	60,729.60		0.00	124,210.99	0.00	0.00				
1000.0	PROGRESSIVE CORP OHIO													
743315103	09/25/2015	04/22/2008	E	30,544.43	17,985.00		0.00	12,559.43	0.00	0.00				
2500.0	PROGRESSIVE CORP OHIO													
743315103	10/23/2015	04/22/2008	E	82,692.47	44,962.50		0.00	37,729.97	0.00	0.00				
3700.0	PROGRESSIVE CORP OHIO													
743315103	11/03/2015	Various	E	123,418.62	67,250.55		0.00	56,168.07	0.00	0.00				
25573.465	T ROWE PRICE NEW ASIA FUND													
77956H500	07/30/2015	Various	E	412,500.00	502,346.25		0.00	-89,846.25	0.00	0.00				
7533.355	T ROWE PRICE NEW ASIA FUND													
77956H500	09/25/2015	06/07/2011	E	108,555.65	147,653.75		0.00	-39,098.10	0.00	0.00				

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2015 Tax Information Statement

Page 16 of 36

Recipient's Name and Address:

ABOT & DOROTHY H STEVENS FDN
1 JOHNSON ST
NORTH ANDOVER, MA 01845

Account Number:

1015010540
XX-XXX7991
06-1798398

Recipient's Tax ID Number:

MA
(201)418-5859

Payer's Federal ID Number:

Payer's State ID Number:

State:

Questions?

☐ Corrected ☐ FATCA ☐ 2nd TIN notice

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140 BROADWAY
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Description of property (Box 1a)

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500.0	U S BANCORP									
902973304	09/25/2015	12/18/2009	E	20,787.11	11,105.40		0.00	9,681.71	0.00	0.00
2100.0	U S BANCORP									
902973304	12/03/2015	12/18/2009	E	91,129.29	46,642.68		0.00	44,486.61	0.00	0.00
500000.0	U S TREASURY BONDS 7.25% 05/15/2016									
912810DW5	08/26/2015	06/11/1996	E	524,609.38	499,839.79		0.00	24,769.59	0.00	0.00
75000.0	WALGREEN CO 5.25% 01/15/2019									
931422AE9	08/10/2015	03/07/2011	E	83,800.63	78,494.68		0.00	5,305.95	0.00	0.00
25000.0	WALGREEN CO 5.25% 01/15/2019									
931422AE9	10/23/2015	03/07/2011	E	27,436.00	26,095.89		0.00	1,340.11	0.00	0.00
150.0	WAL-MART STORES INC									
931142103	01/13/2015	04/23/2007	E	13,584.68	7,409.06		0.00	6,175.62	0.00	0.00
227.0	WASTE MANAGEMENT INC									
94106L109	01/21/2015	05/18/2007	E	11,976.22	8,754.69		0.00	3,221.53	0.00	0.00
307.0	WASTE MANAGEMENT INC									
94106L109	01/22/2015	Various	E	16,201.94	10,227.16		0.00	5,974.78	0.00	0.00
366.0	WASTE MANAGEMENT INC									
94106L109	01/23/2015	12/20/2007	E	19,295.45	12,100.77		0.00	7,194.68	0.00	0.00

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2015 Tax Information Statement

Recipient's Name and Address:

ABBOT & DOROTHY H STEVENS FDN
1 JOHNSON ST
NORTH ANDOVER, MA 01845

Account Number: 1015010540

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State: MA

Questions? (201)418-5859

☐ Corrected ☐ FATCA ☐ 2nd TIN notice

Payer's Name and Address:

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140 BROADWAY
NEW YORK, NY 10005

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Description of property (Box 1a)

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589.0	WASTE MANAGEMENT INC									
94106L109	04/08/2015	12/20/2007	E	32,197.51	19,473.64		0.00	12,723.87	0.00	0.00
111.0	WASTE MANAGEMENT INC									
94106L109	04/09/2015	12/20/2007	E	6,074.21	3,669.90		0.00	2,404.31	0.00	0.00
800.0	WASTE MANAGEMENT INC									
94106L109	09/25/2015	12/20/2007	E	40,201.25	26,449.76		0.00	13,751.49	0.00	0.00
900.0	WASTE MANAGEMENT INC									
94106L109	10/05/2015	Various	E	46,106.15	28,125.81		0.00	17,980.34	0.00	0.00
Total Long Term Sales Reported on 1099-B				4,687,971.86	3,308,381.87		0.00	1,379,590.00	0.00	0.00

Report on Form 8949, Part II, with Box E checked

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Federal Statements

Taxable Dividends from Securities

Description	Amount	Unrelated Business Code	Exclusion Code	Postal Code	US Obs (\$ or %)
BBH FORM 1099-DIV	\$ 356,828		14		
BBH FORM 1099-INT	56,924		14		
BBH US TREASURY BONDS INTERES	28,370		14		
BOND PREMIUM	-15,293		14		
BBH WEALTH STRATEGIES K-1 INT	38,580		14		
BBH WEALTH STRATEGIES K-1 DIV	26,570		14		
TOTAL	\$ <u>491,979</u>				

Other Investment Income

Description	Amount	Unrelated Business Code	Exclusion Code	Postal Code
BBH K-1 ST CAPITAL GAIN	\$ 7,147		18	
TOTAL	\$ <u>7,147</u>			

Year Ending: December 31, 2015

04-6107991

ABBOT & DOROTHY H. STEVENS FOUNDATION
P.O. BOX 111
NORTH ANDOVER, MA 01845

ELECTION TO AMORTIZE BOND PREMIUM

Under IRC Section 171(c) the taxpayer elects to amortize all bond premiums.

EIN#: 04-6107991

TAX YEAR: 2015

STATEMENT 4 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARTABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST

PROJECT #1 – THOMPSON ISLAND OUTWARD BOUND EDUCATION CENTER

1. THE NATURE AND PURPOSES OF THE PROJECT FOR WHICH THE AMOUNTS ARE BEING SET ASIDE:

<u>NAME</u>	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
THOMPSON ISLAND OUTWARD BOUND EDUCATION CENTER	\$15,000	CONNECTIONS PROGRAM SUPPORT FOR BOSTON YOUTH
PO BOX 127		
BOSTON, MA 02127		

2. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2017 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.
3. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).
4. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.
5. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

<u>NAME</u>	<u>YEAR</u>	<u>AMOUNT</u>
THOMPSON ISLAND OUTWARD BOUND EDUCATION CENTER	2015	\$30,000
	2017	15,000
	TOTAL	\$45,000

EIN#: 04-6107991

TAX YEAR: 2015

STATEMENT 4 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARTIBABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST

PROJECT #2 – LAWRENCE COMMUNITY WORKS

1. THE NATURE AND PURPOSES OF THE PROJECT FOR WHICH THE AMOUNTS ARE BEING SET ASIDE:

<u>NAME</u>	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
LAWRENCE COMMUNITY WORKS	\$110,000	WORKING CITIES
168 NEWBURY STREET		
LAWRENCE, MA 01841		

2. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2016 AND 2017 WHICH ARE PERIODS THAT END NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.
3. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).
4. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.
5. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

<u>NAME</u>	<u>YEAR</u>	<u>AMOUNT</u>
LAWRENCE COMMUNITY WORKS	2015	\$55,000
	2016	55,000
	2017	55,000
	TOTAL	\$165,000

EIN#: 04-6107991

TAX YEAR: 2015

STATEMENT 4 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARITABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST

PROJECT #3 – ESSEX COUNTY COMMUNITY FOUNDATION

6. THE NATURE AND PURPOSES OF THE PROJECT FOR WHICH THE AMOUNTS ARE BEING SET ASIDE:

<u>NAME</u>	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
ESSEX COUNTY COMMUNITY FOUNDATION	\$20,000	NEW FUNDRAISING STAFF POSITION
175 ANDOVER STREET		
DANVERS, MA 01923		

7. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2016 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.
8. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).
9. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.
10. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

<u>NAME</u>	<u>YEAR</u>	<u>AMOUNT</u>
ESSEX COUNTY COMMUNITY FOUNDATION	2015	\$20,000
	2016	20,000
	TOTAL	\$40,000

EIN#: 04-6107991

TAX YEAR: 2015

STATEMENT 4 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARITABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST

PROJECT #4 – GIRLS, INC.

1. THE NATURE AND PURPOSES OF THE PROJECT FOR WHICH THE AMOUNTS ARE BEING SET ASIDE:

<u>NAME</u>	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
GIRLS, INC.	\$5,000	STEM PROGRAMMING FOR GIRLS IN LOWELL
220 WORTHEN STREET		
LOWELL, MA 01852		

2. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2016 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.
3. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).
4. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.
5. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

<u>NAME</u>	<u>YEAR</u>	<u>AMOUNT</u>
GIRLS, INC.	2015	\$5,000
	2016	5,000
	TOTAL	\$10,000

EIN#: 04-6107991

TAX YEAR: 2015

STATEMENT 4 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARITABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST

PROJECT #5 – MERRIMACK VALLEY YMCA

6. THE NATURE AND PURPOSES OF THE PROJECT FOR WHICH THE AMOUNTS ARE BEING SET ASIDE:

<u>NAME</u>	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
MERRIMACK VALLEY YMCA	\$75,000	ANDOVER/NORTH ANDOVER BRACH
101 AMESBURY STREET		RENOVATION
LAWRENCE, MA 01840		

7. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2016 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.
8. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).
9. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.
10. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

<u>NAME</u>	<u>YEAR</u>	<u>AMOUNT</u>
MERRIMACK VALLEY YMCA	2015	\$75,000
	2016	75,000
	TOTAL	\$150,000

EIN#: 04-6107991

TAX YEAR: 2015

STATEMENT 4 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARTABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST

PROJECT #6 – LAWRENCE COMMUNITY WORKS

1. THE NATURE AND PURPOSES OF THE PROJECT FOR WHICH THE AMOUNTS ARE BEING SET ASIDE:

<u>NAME</u>	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
LAWRENCE COMMUNITY WORKS	\$10,000	WORKING CITIES
168 NEWBURY STREET		
LAWRENCE, MA 01841		

2. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2016 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.
3. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).
4. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.
5. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

<u>NAME</u>	<u>YEAR</u>	<u>AMOUNT</u>
LAWRENCE COMMUNITY WORKS	2015	\$25,000
	2016	10,000
	TOTAL	\$35,000

ABBOT & DOROTHY H. STEVENS FOUNDATION

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TAX YEAR: 2015

FORM 990PF

PART XV 3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
BOSTON UNIVERSITY INST. FOR NON-PROFITS BU SCHOOL OF MANAGEMENT, BARRY DYM, EXEC DIRECTOR 95 COMMONWEALTH AVE., BOSTON, MA 02116	501(C)(3) CHARITABLE ORGANIZATION	MERRIMACK VALLEY NON-PROFITS PROGRAMMING	12,000.00
ECCF SUMMER IN GREATER LAWRENCE CAROL SCHUSTER, ADMIN 175 ANDOVER STREET SUITE 101, DANVERS, MA 01923	501(C)(3) CHARITABLE ORGANIZATION	SUMMER 2015 SUPPORT	45,000.00
PROJECT BREAD ELLEN PARKER, EXEC DIRECTOR 145 BORDER STREET, BOSTON, MA 02128	501(C)(3) CHARITABLE ORGANIZATION	CHEFS IN HEAD START PROGRAM LAWRENCE START-UP	10,000.00
SELF ESTEEM BOSTON MARION DAVIS, PRESIDENT PO BOX 301155, JAMAICA PLAIN, MA 02130	501(C)(3) CHARITABLE ORGANIZATION	PROVIDE TRAINING MERRIMACK VALLEY TOWARDS LORING MATCH	5,000.00
THOMPSON ISLAND OUTWARD BOUND ARTHUR PEARSON, PRESIDENT PO BOX 127, BOSTON, MA 02127	501(C)(3) CHARITABLE ORGANIZATION	CONNECTIONS PROGRAM SUPPORT	15,000.00
PINGREE SCHOOL PREP @ PINGREE STEVE FILOSA, DIRECTOR P@P 537 HIGHLAND STREET, SOUTH HAMILTON, MA 01982	501(C)(3) CHARITABLE ORGANIZATION	OPERATING, PREP@PINGREE PROGRAM	10,000.00
MI NURSING/RESTORATIVE CENTER GERLAD FOLEY, PRESIDENT/CEO 172 LAWRENCE STREET, LAWRENCE, MA 01841	501(C)(3) CHARITABLE ORGANIZATION	MEMORY GARDEN CONSTRUCTION & LANDSCAPING	30,000.00
MERRIMACK VALLEY IMMIGRANT EDUCATION CENTER KAREN SHERIDAN, PROGRAM DIRECTOR 20 BALLARD ROAD, LAWRENCE, MA 01843	501(C)(3) CHARITABLE ORGANIZATION	PROGRAM & OPERATING SUPPORT	10,000.00
ELEVATED THOUGHT FOUNDATION LESTER SYDNEY, CO FOUNDER 22 HEATHER DRIVE, METHUEN, MA 01844	501(C)(3) CHARITABLE ORGANIZATION	PROGRAM SUPPORT	15,000.00
ADDISON GALLERY JUDITH DOLKART, DIRECTOR PHILLIPS ACADEMY, ANDOVER, MA 01810	501(C)(3) CHARITABLE ORGANIZATION	OUTREACH TO LAWRENCE	20,000.00

ABBOT & DOROTHY H. STEVENS FOUNDATION
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PART XV 3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT		FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NAME AND ADDRESS				
NEW PROFIT INC - TEACH FOR AMERICA				
JOSH BIBER, EXEC DIRECTOR		501(C)(3)	LAWRENCE CORPS SUPPORT	40,000.00
60 CANAL STREET 3RD FLOOR, BOSTON, MA 02114				
BELLESINI ACADEMY		501(C)(3)	OPERATING SUPPORT	25,000.00
JULIE DIFILIPPO, EXEC DIRECTOR		CHARITABLE ORGANIZATION		
94 BRADFORD STREET, LAWRENCE, MA 01840				
CATHOLIC SCHOOLS FOUNDATION		501(C)(3)	INNER-CITY SCHOLARSHIPS LAWRENCE	12,000.00
MICHAEL REARDON, EXEC DIRECTOR		CHARITABLE ORGANIZATION		
260 FRANKLIN STREET STE 630, BOSTON, MA 02110				
PHILLIPS ACADEMY - ABL		501(C)(3)	ABL PROGRAM SUPPORT	25,000.00
SHARYN BAHN		CHARITABLE ORGANIZATION		
180 MAIN STREET, ANDOVER, MA 01810				
APPALACHIAN MOUNTAIN CLUB		501(C)(3)	LOWELL LAWRENCE PROGRAMMING	30,000.00
MARGARET McNAMARA, DIRECTOR OF CORP/FOUND		CHARITABLE ORGANIZATION		
5 JOY STREET, BOSTON, MA 02108				
ESSEX ART CENTER		501(C)(3)	OPERATING SUPPORT	27,500.00
JOHN BUDZYNA, EXEC DIRECTOR		CHARITABLE ORGANIZATION		
56 ISLAND STREET, LAWRENCE, MA 01840				
FAMILY TO FAMILY		501(C)(3)	ASSISTANCE FOR MERRIMACK VALLEY FAMILIES	3,000.00
SCOTT SMITH, EXEC DIRECTOR		CHARITABLE ORGANIZATION		
14 BEACON STREET, BOSTON, MA 02108				
GOVERNOR'S ACADEMY		501(C)(3)	GOVS PLUS PROGRAM SUPPORT	8,000.00
TATIANA CRUZ		CHARITABLE ORGANIZATION		
1 ELM STREET, BYFIELD, MA 01922				
INTERNATIONAL INSTITUTE OF LOWELL		501(C)(3)	REFUGEE SCHOOL SUCCESS PROGRAM LOWELL	4,000.00
ALEXANDRA WEBER, CPO		CHARITABLE ORGANIZATION		
144 MERRIMACK STREET, LOWELL, MA 01820				
MERRIMACK VALLEY YMCA		501(C)(3)	LAWRENCE BRANCH EDUCATION INITIATIVE	30,000.00
STEPHEN IVES, PRESIDENT		CHARITABLE ORGANIZATION		
101 AMESBURY STREET 4TH FLOOR, LAWRENCE, MA 01840				
JEANNE GRIEGER CRISIS CENTER		501(C)(3)	PROGRAM SUPPORT	7,000.00
SUZANNE DUBUS, CEO		CHARITABLE ORGANIZATION		
2 HARRIS STREET, NEWBURYPORT, MA 01950				
GREATER LAWRENCE COMMUNITY BOATING		501(C)(3)	OPERATING SUPPORT	10,000.00
PO BOX 955, LAWRENCE, MA 01842		CHARITABLE ORGANIZATION		

ABBOT & DOROTHY H. STEVENS FOUNDATION

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PART XV 3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
MERRIMACK VALLEY YMCA STEPHEN IVES, PRESIDENT 101 AMESBURY STREET 4TH FLOOR, LAWRENCE, MA 01840	501(C)(3) CHARITABLE ORGANIZATION	ANDOVER/N. ANDOVER BRANCH RENOVATION	75,000.00
BOSTON CHILDREN'S MUSEUM CAROLE CHAMOW, PRESIDENT 308 CONGRESS STREET, BOSTON, MA 02210	501(C)(3) CHARITABLE ORGANIZATION	SPONSOR LAWRENCE AND LOWELL CHILDREN'S VISITS	8,000.00
BOYS & GIRLS CLUB OF GREATER LOWELL JOSEPH HUNGLER, EXEC DIRECTOR 657 MIDDLESEX STREET, LOWELL, MA 01851	501(C)(3) CHARITABLE ORGANIZATION	STEAM PROGRAMMING - AFTERSCHOOL & SUMMER	17,500.00
GIRL SCOUTS OF EASTERN MASSACHUSETTS EMILY DODD, ASST DIRECTOR OF DEVELOP 95 BERKELEY STREET, BOSTON, MA 02116	501(C)(3) CHARITABLE ORGANIZATION	FAB FACTOR PROGRAM LAWRENCE	5,000.00
UNITED WAY OF MASS BAY & MERRIMACK VALLEY BARRY DYM, INSTITUTE FOR NON-PROFIT MANAGEMENT 51 SLEEPER STREET, BOSTON, MA 02210	501(C)(3) CHARITABLE ORGANIZATION	CORE CERTIFICATE PROGRAM LOWELL 2015	21,000.00
LAWRENCE COMMUNITY WORKS TODD FRY, MILL CITIES LEADERSHIP INSTITUTE 168 NEWBURY STREET, LAWRENCE, MA 01841	501(C)(3) CHARITABLE ORGANIZATION	HIRING PROJECT MANAGER FOR REAL ESTATE DEVELOP INITIATIVES AND MOVEMENT CITY YOUTH CENTER	55,000.00
LAWRENCE FAMILY DEVEL & EDUCATION FUND RALPH CARRERO, EXEC DIRECTOR 3 WEST STREET, LAWRENCE, MA 01841	501(C)(3) CHARITABLE ORGANIZATION	QUINTANA CITIZENSHIP NEW AMERICANS PROGRAM	25,000.00
LOWELL COMMUNITY HEALTH CENTER DORCAS GRIGG SAITO, CEO 161 JACKSON STREET, LOWELL, MA 01852	501(C)(3) CHARITABLE ORGANIZATION	WRAPAROUND FUND SUPPORT	12,500.00
LAWRENCE COMMUNITY WORKS TODD FRY, MILL CITIES LEADERSHIP INSTITUTE 168 NEWBURY STREET, LAWRENCE, MA 01841	501(C)(3) CHARITABLE ORGANIZATION	MILL CITIES LEADERSHIP INSTITUTE CLASS OF 2016	8,000.00
SQUASHBUSTERS GREG ZAFF, FOUNDER & EXEC DIRECTOR 60 ISLAND STREET, LAWRENCE, MA 01840	501(C)(3) CHARITABLE ORGANIZATION	OPERATING SUPPORT	10,000.00
LAWRENCE PERFORMING ARTS HIGH SCHOOL MATTHEW EVANGELISTA, DIRECTOR OF THEATRE 70-72 NORTH PARISH ROAD, LAWRENCE, MA 01843	501(C)(3) CHARITABLE ORGANIZATION	FRINGE FEST TRIP FOR THEATRE DEPT STUDENTS	8,000.00
OLD STURBRIDGE VILLAGE JAMES DONAHUE, PRES/CEO 1 STURBRIDGE VILLAGE ROAD, STURBRIDGE, MA 01566	501(C)(3) CHARITABLE ORGANIZATION	FREE & REDUCED ADMISSIONS FOR LAWRENCE & LOWELL	4,000.00

ABBOT & DOROTHY H. STEVENS FOUNDATION
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RECIPIENT		FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NAME AND ADDRESS				
NEVINS FAMILY OF SERVICES JOYCE SHANNON, CEO 10-12 INGALLS COURT, METHUEN, MA 01844		501(C)(3) CHARITABLE ORGANIZATION	CAPITAL RENOVATION NURSING & REHAB CENTER	25,000.00
AFTER SCHOOL PARTNERS CINDY WEINER, EXEC DIR 342 A BOYLSTON STREET, NEWTON, MA 02459		501(C)(3) CHARITABLE ORGANIZATION	LAWRENCE PROGRAMMING	10,000.00
BOSTON BAROQUE MIGUEL RODRIGUEZ, EXEC DIRECTOR 10 GUEST STREET SUITE 290, BOSTON, MA 02135		501(C)(3) CHARITABLE ORGANIZATION	LAWRENCE OUTREACH & PARTNERSHIP W/ ESSEX ART CENTER	5,000.00
CAMBRIDGE COLLEGE SONNYA ESPINAL, DIR OF INSTITUTE SUPPORT 1000 MASS AVENUE, CAMBRIDGE, MA 02138		501(C)(3) CHARITABLE ORGANIZATION	LANGUAGE IMMERSION PROGRAM - LAWRENCE CAMPUS	10,000.00
ESSEX COUNTY COMMUNITY FOUNDATION DAVE EDWARDS, EXEC DIRECTOR 175 ANDOVER STREET SUITE 101, DANVERS, MA 01923		501(C)(3) CHARITABLE ORGANIZATION	NEW FUNDRAISING STAFF POSITION	20,000.00
NOTRE DAME CRISTO REY HIGH SCHOOL SISTER MARYALYCE GILFEATHER, PRESIDENT 303 HAVERHILL STREET, LAWRENCE, MA 01840		501(C)(3) CHARITABLE ORGANIZATION	WORK STUDY PROGRAM	50,000.00
PLIMOTH PLANTATION JILL TOMPKINS, INSTIT GIVING MANAGER PO BOX 1620, PLYMOUTH, MA 02362		501(C)(3) CHARITABLE ORGANIZATION	LAWRENCE CLASSROOM VISITS & ADMISSIONS	5,000.00
REGIS COLLEGE ANTOINETTE HAYS, PRESIDENT 235 WELLESLEY STREET, WESTON, MA 02493		501(C)(3) CHARITABLE ORGANIZATION	NURSE PRACTITIONER TO LAWRENCE CATHOLIC ACADEMY	10,000.00
ENDICOTT COLLEGE RICHARD WYLIE, PRESIDENT 376 HALE STREET, BEVERLY, MA 01915		501(C)(3) CHARITABLE ORGANIZATION	KEYS TO DEGREES PROGRAM - LAWRENCE STUDENT	15,000.00
NEW PROFIT - PLAYWORKS EDUCATION MAX FRIPP, EXEC DIRECTOR 29 GERMANIA STREET, BOSTON, MA 02130		501(C)(3) CHARITABLE ORGANIZATION	LAWRENCE PROGRAMMING	45,000.00
BOSTON CHILDREN'S MUSEUM CAROLE CHAMOW, PRESIDENT 308 CONGRESS STREET, BOSTON, MA 02210		501(C)(3) CHARITABLE ORGANIZATION	CHRIS ROGERS MATCH - GENERAL SUPPORT	5,000.00
GROUNDWORK LAWRENCE HEATHER MCMANN, EXEC DIR 60 ISLAND STREET, LAWRENCE, MA 01840		501(C)(3) CHARITABLE ORGANIZATION	OPERATING SUPPORT	40,000.00

ABBOT & DOROTHY H. STEVENS FOUNDATION
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RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
OUR RESTORATIVE JUSTICE MONICA JOHNSON, EXEC DIRECTOR 175 CABOT STREET SUITE 100, LOWELL, MA 01854	501(C)(3) CHARITABLE ORGANIZATION	PROGRAMMING & CAPACITY BUILDING	5,000.00
ESSEX COUNTY GREENBELT ASSOCIATION ED BECKER, EX DIR 82 EASTERN AVENUE, ESSEX, MA 01929	501(C)(3) CHARITABLE ORGANIZATION	LANDOWNER & STEWARDSHIP DATABASE REDESIGN PROJECT	15,000.00
ALL FIVE 5 REYNA PLACE, MENLO PARK, CA 94025	501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	1,000.00
ASIAN TASK FORCE AGAINST DOMESTIC VIOLENCE PO BOX 120108, BOSTON, MA 02112	501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	1,000.00
BOSTON LATIN GIRLS CREW BETH MCDUGAL, TREASURER 4 WOODS PLACE, CHARLESTOWN, MA 02129	501(C)(3) CHARITABLE ORGANIZATION	GIRLS CREW SUPPORT	750.00
BOSTON LATIN SCHOOL ASSOCIATION 27 SCHOOL STREET SUITE 300, BOSTON, MA 02108	501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	750.00
MASS AUDUBON BOSTON NATURE CENTER 500 WALK HILL STREET, MATAPAN, MA 02126	501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	5,000.00
BOSTON LATIN ACADEMY 205 TOWNSENDS STREET, BOSTON, MA 02125	501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	5,000.00
GAY LESBIAN ADVOCATES & DEFENDERS 30 WINTER ST, SUITE 800, BOSTON, MA 02108	501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	5,000.00
PROJECT HOPE 550 DUDLEY STREET, ROXBURY, MA 02119	501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	1,500.00
SI SE PUEDE LORIE MENDOZA, DIRECTOR PO BOX 53, NORTH ANDOVER, MA 01845	501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	5,000.00
NEW ENGLAND CONSERVATORY 290 HUNTINGTON AVENUE BOSTON, MA 02115	501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	5,000.00

ABBOT & DOROTHY H. STEVENS FOUNDATION
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BOSTON CHILDREN'S MUSEUM CAROLE CHAMOW, PRESIDENT 308 CONGRESS STREET, BOSTON, MA 02210	501(C)(3) CHARITABLE ORGANIZATION	DEBT REDUCTION CAMPAIGN SUPPORT	10,000.00
PLEASANT BAY COMMUNITY BOATING JOHN DICKSON, SITE COMM CHAIR PO BOX 22, NORTH CHATHAM, MA 02650	501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	5,000.00
BREAD & ROSES SUSAN MCGIBBON SIROIS, EXEC DIR 58 NEWBURY STREET, LAWRENCE, MA 01804	501(C)(3) CHARITABLE ORGANIZATION	OPERATING SUPPORT	25,000.00
BREAD & ROSES HOUSING YESINIA GIL, EXEC. DIR PO BOX 7, LAWRENCE, MA 01840	501(C)(3) CHARITABLE ORGANIZATION	PROGRAM SUPPORT & LAWRENCE PROPERTY PURCHASE	25,000.00
HANDEL & HAYDN SOCIETY LOUISE TRACKMAN, ASSOC DIR INSTITUT GIV 300 MASSACHUSETTS AVE, BOSTON, MA 02115	501(C)(3) CHARITABLE ORGANIZATION	OUTREACH MERRIMACK VALLEY	6,000.00
MERRIMACK VALLEY HABITAT FOR HUMANITY RANDY LARSON, EXEC. DIRECTOR 60 ISLAND STREET, LAWRENCE, MA 01840	501(C)(3) CHARITABLE ORGANIZATION	LAND ACQUISITION & GENERAL OPERATING	40,000.00
U ASPIRE GABRIELLE KING MORSE, EX DIR 31 ST JAMES ST, SUITE 520, BOSTON, MA 02116	501(C)(3) CHARITABLE ORGANIZATION	LAWRENCE PROGRAMMING SUPPORT	7,500.00
SEVEN & EIGHT PARK STREET FOUNDATION 8 PARK STREET, BOSTON, MA 02108	501(C)(3) CHARITABLE ORGANIZATION	WINDOW REPLACEMENT CAMPAIGN	5,000.00
BOWDOIN COLLEGE 4100 COLLEGE STATION, BRUNSWICK, ME 04011-8432	501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	1,500.00
BRITISH SCHOOL & UNIVERSITY - OUNDLE 575 MADISON AVE SUITE 1006 NEW YORK, NY 10022-2511	501(C)(3) CHARITABLE ORGANIZATION	OUNDL SCHOOL SUPPORT	500.00
TABOR ACADEMY 66 SPRING STREET, MARION, MA 02738	501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	1,000.00
PIKE SCHOOL 34 SUNSET ROCK ROAD, ANDOVER, MA 01810	501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	100.00

ABBOT & DOROTHY H. STEVENS FOUNDATION

EIN: 04-6107991

TAX YEAR: 2015

FORM 990PF

PART XV 3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
ENGLISH SPEAKING UNION 144 EAST 39TH ST, NEW YORK, NY 10016	501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	250.00
NAHANT VILLAGE CHURCH PO BOX 77, NAHANT, MA 01908	501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	3,000.00
CHATHAM CONSERVATION FOUNDATION 104 CROWELL ROAD, CHATHAM, MA 02633	501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	250.00
FRIENDS OF PLEASANT BAY PO BOX 1243, HARWICH, MA 02645	501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	100.00
FRIENDS OF CHATHAM WATERWAYS PO BOX 472, CHATHAM, MA 02633-0472	501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	100.00
CHATHAM HISTORICAL SOCIETY PO BOX 709, CHATHAM, MA 02633	501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	100.00
PLEASANT BAY COMMUNITY BOATING JOHN DICKSON, SITE COMM CHAIR PO BOX 22, NORTH CHATHAM, MA 02650	501(C)(3) CHARITABLE ORGANIZATION	IN HONOR OF LYNDY ROGERS	1,000.00
NAHANT HISTORICAL SOCIETY 41 VALLEY ROAD, NAHANT, MA 01908	501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	100.00
NAHANT PRESERVATION TRUST PO BOX 30, NAHANT, MA 01908	501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	150.00
AMERICAN CANCER SOCIETY 30 SPEEN STREET, FRAMINGHAM, MA 01701	501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	100.00
ALZHEIMERS ASSOCIATION 480 PLEASANT STREET, WATERTOWN, MA 02472	501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	100.00
TRINITY CHURCH 206 CLARENDON STREET, BOSTON, MA 02116-3722	501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	250.00

ABBOT & DOROTHY H. STEVENS FOUNDATION

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FORM 990PF

PART XV 3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT		FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NAME AND ADDRESS				
BOSTON CHILDREN'S MUSEUM CAROLE CHAMOW, PRESIDENT 308 CONGRESS STREET, BOSTON, MA 02210		501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	2,000.00
SAENGERFEST CONCERT CHORUS 77 MAIN STREET, MEDWAY, MA 02053		501(C)(3) CHARITABLE ORGANIZATION	IN HONOR OF SAMUEL S. ROGERS	250.00
ESSEX COUNTY COMMUNITY FOUNDATION DAVE EDWARDS, EXEC. DIRECTOR 175 ANDOVER STREET SUITE 101, DANVERS, MA 01923		501(C)(3) CHARITABLE ORGANIZATION	COMMUNITY LEADERSHIP PROJECT	20,000.00
YOUTH DEVELOPMENT ORGANIZATION MARK KAMPERT, EXEC. DIRECTOR 15 UNION STREET #563, LAWRENCE, MA 01840		501(C)(3) CHARITABLE ORGANIZATION	OPERATING & PROGRAM SUPPORT	40,000.00
GIRLS, INC. TRACY REILLY INGERSOLL, EXEC. DIRECTOR 220 WORTHEN STREET, LOWELL, MA 01852		501(C)(3) CHARITABLE ORGANIZATION	STEM PROGRAMMING LOWELL GIRLS	5,000.00
THOMPSON ISLAND OUTWARD BOUND ARTHUR PEARSON, PRESIDENT PO BOX 127, BOSTON, MA 02127		501(C)(3) CHARITABLE ORGANIZATION	GENERAL SUPPORT	15,000.00

TOTAL

1,146,850.00