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Form

990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2015

Open to Public Inspection

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

Name of foundation THE ASHURST FOUNDATION C/O ELIZABETH K POZEN		A Employer identification number 20-6325176	
Number and street (or P O box number if mail is not delivered to street address) 9 ARLINGTON STREET		B Telephone number (see instructions) (617) 954-5707	
City or town, state or province, country, and ZIP or foreign postal code BOSTON, MA 021163410		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change		Initial return of a former public charity ☐ Amended return ☐ 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		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 18,840,771		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)		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 <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		Revenue and expenses per books (a)	Net investment income (b)	Adjusted net income (c)	Disbursements for charitable purposes (d) (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	200,000			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	78	78		
	4 Dividends and interest from securities	702,554	702,554		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10 57,644	57,644			
	b Gross sales price for all assets on line 6a <u>210,856</u>				
	7 Capital gain net income (from Part IV, line 2)		37,440		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	10,107	10,107		
	12 Total. Add lines 1 through 11	970,383	750,179		
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).	2,900	2,900		
	c Other professional fees (attach schedule)	33,624	33,624		
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	53,871	41,877		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings.				
	22 Printing and publications				
	23 Other expenses (attach schedule).	500			
	24 Total operating and administrative expenses. Add lines 13 through 23	90,895	78,401		0
	25 Contributions, gifts, grants paid	971,950			971,950
	26 Total expenses and disbursements. Add lines 24 and 25	1,062,845	78,401		971,950
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-92,462			
	b Net investment income (if negative, enter -0-)		671,778		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	372,637	346,274	346,274
	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)	10,870,288 	9,950,080	9,950,080
	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)	9,413,988 	8,544,417	8,544,417
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets(to be completed by all filers—see the instructions Also, see page 1, item I)	20,656,913	18,840,771	18,840,771	
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	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	20,656,913	18,840,771	
	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)	20,656,913	18,840,771	
31	Total liabilities and net assets/fund balances(see instructions)	20,656,913	18,840,771		

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	20,656,913
2	Enter amount from Part I, line 27a	2	-92,462
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	20,564,451
5	Decreases not included in line 2 (itemize) ▶ _____ 	5	1,723,680
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	18,840,771

Part IV

Capital Gains and Losses for Tax on Investment Income

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

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
a			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			Gains (Col (h) gain minus col (k), but not less than -0-) or (l) Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
a			
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	37,440
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 }		3	

Part V

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2014	803,350	19,730,447	0 040716
2013	637,550	17,900,743	0 035616
2012	420,422	12,676,936	0 033164
2011	312,000	8,519,649	0 036621
2010	239,925	6,277,928	0 038217

2	Total of line 1, column (d).	2	0 184334
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 036867
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	19,456,199
5	Multiply line 4 by line 3.	5	717,292
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	6,718
7	Add lines 5 and 6.	7	724,010
8	Enter qualifying distributions from Part XII, line 4.	8	971,950

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 ☐ 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

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-)

3

Add lines 1 and 2.

4

Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

5

Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-

6

Credits/Payments

a

2015 estimated tax payments and 2014 overpayment credited to 2015

6a

14,000

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.

8

Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.

9

Tax due. If the total of lines 5 and 8 is more than line 7, enter **amount owed**

10

Overpayment. If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid**.

11

Enter the amount of line 10 to be **Credited to 2015 estimated tax** ☒ 7,282 **Refunded** ☒

1	6,718
2	
3	6,718
4	
5	6,718
6a	14,000
6b	
6c	
6d	
7	14,000
8	
9	
10	7,282
11	

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?

1a

No

b

Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.

1b

No

c

Did the foundation file **Form 1120-POL** for this year?

1c

No

d

Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:
(1) On the foundation ☒ \$ _____ (2) On foundation managers ☒ \$ _____

e

Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☒ \$ _____

2

Has the foundation engaged in any activities that have not previously been reported to the IRS?
If "Yes," attach a detailed description of the activities.

2

No

3

Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*

3

No

4a

Did the foundation have unrelated business gross income of \$1,000 or more during the year?

4a

No

b

If "Yes," has it filed a tax return on **Form 990-T** for this year?

4b

5

Was there a liquidation, termination, dissolution, or substantial contraction during the year?
If "Yes," attach the statement required by General Instruction T.

5

No

6

Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:
• By language in the governing instrument, or
• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?

6

Yes

7

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

7

Yes

8a

Enter the states to which the foundation reports or with which it is registered (see instructions):
☒ MA

b

If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation.*

8b

Yes

9

Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)?
If "Yes," complete Part XIV

9

No

10

Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*

10

No

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 ▶THE FOUNDATION Telephone no ▶(617) 954-5707 Located at ▶9 ARLINGTON STREET BOSTON MA ZIP+4 ▶021163410			
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 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? ☐ 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)? ☐	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		
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? ☐ Yes ☒ No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions). ☐	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?(<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015.</i>) ☐	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)?

☐ Yes ☒ No

Organizations relying on a current notice regarding disaster assistance check here.

c

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

☐ Yes ☒ No

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

6a

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

☐ Yes ☒ No

b

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

☐ Yes ☒ No

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

7a

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

☐ Yes ☒ No

b

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

5b

6b

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
ELIZABETH K POZEN	TRUSTEE	0	0	0
9 ARLINGTON STREET	0 00			
BOSTON, MA 021163410				
ROBERT C POZEN	TRUSTEE	0	0	0
9 ARLINGTON STREET	0 00			
BOSTON, MA 021163410				
DAVID E POZEN	TRUSTEE	0	0	0
305 RIVERSIDE DRIVE	0 00			
NEW YORK, NY 10025				
JOANNA R POZEN	TRUSTEE	0	0	0
166 PROSPECT PLACE APT 2	0 00			
BROOKLYN, NY 11238				

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.

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Part VIII

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

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

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 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	19,389,387
b	Average of monthly cash balances.	1b	363,099
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	19,752,486
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	19,752,486
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	296,287
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	19,456,199
6	Minimum investment return. Enter 5% of line 5.	6	972,810

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	972,810
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	6,718
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	6,718
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	966,092
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	966,092
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	966,092

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	971,950
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	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	971,950
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	6,718
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	965,232

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				966,092
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.			971,547	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2015				
a From 2010.				
b From 2011.				
c From 2012.				
d From 2013.				
e From 2014.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2015 from Part XII, line 4 ▶ \$ 971,950				
a Applied to 2014, but not more than line 2a			971,547	
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.				403
e Remaining amount distributed out of corpus				
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				
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 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015.				965,689
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.				
10 Analysis of line 9				
a Excess from 2011. . . .				
b Excess from 2012. . . .				
c Excess from 2013. . . .				
d Excess from 2014. . . .				
e Excess from 2015. . . .				

Part XIV

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

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

	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 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))

ROBERT C POZEN

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

NONE

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 email address of the person to whom applications should be addressed

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

c Any submission deadlines

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

Part XV

Supplementary Information(continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	971,950
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount		
1 Program service revenue						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments.						
3 Interest on savings and temporary cash investments			14	78		
4 Dividends and interest from securities. . . .			14	702,554		
5 Net rental income or (loss) from real estate						
a Debt-financed property.						
b Not debt-financed property.						
6 Net rental income or (loss) from personal property						
7 Other investment income.			14	10,107		
8 Gain or (loss) from sales of assets other than inventory			14	37,440	20,204	
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue a _____						
b _____						
c _____						
d _____						
e _____						
12 Subtotal Add columns (b), (d), and (e). . .				750,179	20,204	
13 Total. Add line 12, columns (b), (d), and (e).			13		770,383	

(See worksheet in line 13 instructions to verify calculations)

[illegible]

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ALZHEIMERS ASSOCIATION 311 ARSENAL STREET WATERTOWN,MA 02472		501 (C) (3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	10,000
AM ACADEMY OF ARTS & SCIENTCES 136 IRVING STREET CAMBRIDGES,MA 02138		501 (C) (3)	TO SUPPORT ORG 'S TAX-EXEPMT PURPOSE	400
BOSTON ARTS ACADEMY FOUNDATION 174 IPSWICH STREET BOSTON,MA 02215		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	9,950
BOSTON FOUNDATION 75 ARLINGTON STREET BOSTON,MA 02116		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	50,000
CAPITAL MARKETS REGULATIONS COMMITT 125 MT AUBURN STREET CAMBRIDGE,MA 02138		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	2,000
COMBINED JEWISH PHILANTROPIES 126 HIGH STREET BOSTON,MA 02110		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	10,000
COMMITTEE TO LIGHT COMMONWEALTH AVE 234 CLARENDON STREET BOSTON,MA 02116		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	1,000
COMMUNITY LEARNING CENTER 5 WESTERN AVE CAMBRIDGE,MA 02139		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
COUNCIL ON FOREIGN RELATIONS 58 EAST 68TH ST NEWYORK,NY 10065		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
DIMOCK COMMUNITY HEALTH CENTER 55 DIMOCK STREET ROXBURY,MA 02119		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	7,100
DOCTORS WITHOUT BORDERS USA 333 7TH AVE 2ND FL NEWYORK,NY 10001		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	1,000
FRIENDS OF THE PUBLIC GARDEN 87 MOUNT VERNON STREET BOSTON,MA 02108		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	5,000
HABITAT FOR HUMANITY PO BOX 1093 VINEYARD HAVEN,MA 02568		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	100
HARARD UNIVERSITY 124 MOUNT AUBURN STREET CAMBRIDGE,MA 02138		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	1,000
HOME FOR LITTLE WANDERERS 271 HUNTINGTON AVE BOSTON,MA 02115		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	25,000
Total			3a	971,950

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
INSTITUTE FOR INTERNATIONAL EDUCATI 1400 K STREET NW 650 WASHINGTON,DC 20005		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	1,000
INSTITUTE OF CONTEMPORARY ART 100 NORTHERN AVENUE BOSTON,MA 02210		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	2,500
MARTHA'S VINEYARD HEBREW CENTER 130 CENTER STREET VINEYARD HAVEN,MA 02568		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	500
MARTHA'S VINEYARD SUMMER INSTITUTE PO BOX 692 VINEYARD HAVEN,MA 02568		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	2,000
MASSACHUSETTS COLLEGE OF ART 621 HUNTINGTON STREET BOSTON,MA 02115		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	50,000
MASSACHUSETTS INSTITUTE FOR TECHNOL 600 MEMORIAL DRIVE CAMBRIDGE,MA 02139		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	170,000
MASSACHUSETTS TAXPAYERS FOUNDATION 323 WASHINGTON STREET BOSTON,MA 02108		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	500
MCMULLEN MUSEUM 140 COMMONWEALTH AVE CHESTNUT HILL,MA 02467		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	1,000
MUSEUM OF AFRICAN AMERICAN HISTORY 14 BEACON STREET BOSTON,MA 02108		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	1,000
MUSEUM OF FINE ARTS BOSTON 465 HUNTINGTON AVE BOSTON,MA 02115		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	7,500
NEW ENGLAND CONSERVATORY 290 HUNTINGTON AVE BOSTON,MA 02115		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	1,000
PMC JIMMY FUND 10 BROOKLINE PLACE WEST BROOKLINE,MA 02445		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	500
TEACH FOR AMERICA 60 CANAL STREET 3RD FL BOSTON,MA 02114		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	10,000
TEMPLE ISRAEL 477 LONGWOOD AVE BOSTON,MA 02215		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	5,000
TENACITY 38 EVERETT STREET BOSTON,MA 02134		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	120,000
Total				971,950

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
UASPIRE 31 ST JAMES AVE SUITE 520 BOSTON,MA 02116		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	500
UNITED WAY OF MASS BAY 51 SLEEPER STREET BOSTON,MA 02210		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	10,000
VINEYARD HAVEN TENNIS FOUNDATION PO BOX 507 VINEYARD HAVEN,MA 02568		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
VINEYARD HOUSE 15 CHURCH STREET VINEYARD HAVEN,MA 02568		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	500
VINEYARD PLAYHOUSE 24 CHURCH STREET VINEYARD HAVEN,MA 02568		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	5,000
WBUR 890 COMMONWEALTH AVE 3F BOSTON,MA 02215		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	5,000
WGBH ONE GUEST STREET BOSTON,MA 02135		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	26,000
YALE LAW SCHOOL PO BOX 2038 NEW HAVEN,CT 06521		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	1,000
FACING HISTORY 16 HURD STREET BROOKLINE,MA 02445		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	5,000
MA SOC PREVENT CRUALITY TO CHILDRE 3815 WASHINGTON STREET BOSTON,MA 02130		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	1,000
BOTTOM LINE 500 ARMORY STREET BOSTON,MA 02130		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
ASSOCIATES OF PUBLIC LIBRARY 700 BOYLSTON STREET BOSTON,MA 02116		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	1,500
BOSTON LYRIC OPERA 11 AVE DE LAFAYETTE BOSTON,MA 02111		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	2,000
MARTHA'S VINYARD'S FILM SOCIETY 79 BEACH ROAD VINEYARD HAVEN,MA 02568		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	1,500
CAREER COLLABORATIVE 77 SUMMER STREET BOSTON,MA 02110		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	500
Total 3a				971,950

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CAMP JABBERWOCKY PO BOX 1357 VINEYARD HAVEN,MA 02568		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
BRIDGEPORT TENNIS PO BOX 185574 HAMDEN,CT 06518		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
ST BOTALPH'S CLUB 199 COMMONWEALTH AVE BOSTON,MA 02116		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
BOSTON SCHOOL FUND 103 HIGHLAN ROAD SOMERVILLE,MA 02144		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	1,000
FEATHERSTONE ARTS CENTER PO BOX 1145 OAK BLUFFS,MA 02557		501(C)(3)	TO SUPPORT ORG 'S TAX EMEMPT PURPOSE	1,000
MARTHA'S VINEYARD CMTY SERVICES 111 EDGARTOWN ROAD VINEYARD HAVEN,MA 02568		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	1,000
ISLAND HOUSING TRUST PO BOX 779 WEST TISBURY,MA 02575		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	500
BNAI BRITH 1120 20TH ST NW WASHINGTON,DC 20036		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	5,000
FRIENDS OF IDF 154 WELLS AVE NEWTON,MA 02459		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	1,000
BROOKINGS INSTITUTION 1775 MASSACHUSETTS AVE WASHINGTON,DC 20036		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	150,000
URBAN INSTITUTE 2100 M ST NW WASHINGTON,DC 20037		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	150,000
MERCY CORPS 45 SWANKENY ST PORTLAND,OR 97204		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
PLANNED PARENTHOOD 1055 COMMONWEALTH AVE BOSTON,MA 02215		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	500
BRIDGE OVER TROUBLE WATERS 47 WEST ST BOSTON,MA 02111		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	500
SUMMER SEARCH 500 SANSOME ST SAN FRANCISCO,CA 94111		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	500
Total				971,950

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
MA SOC TO PREVENT CRUELTY TO ANIMAL 350 SOUTH HUNTINGTON AVE BOSTON,MA 02130		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	1,000
READING IS FUNDIMENTAL 1730 RHODE ISLAND AVE NW WASHINGTON,DC 20036		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	100
WORLD WILDLIFE FUND 1250 24TH ST NW WASHINGTON,DC 20037		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	100
WOMEN'S LUNCH PLACE 67 NEWBURY ST BOSTON,MA 02116		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	100
VICTIMS OF TORTURE 2356 UNIVERSITY AVE WEST ST PAUL,MN 55114		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	100
CANCER CARE 275 SEVENTH AVE NEWYORK,NY 10001		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	100
PINE STREET INN 444 HARRISON AVE BOSTON,MA 02118		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	100
INT RESCUE COMMITEE 122 EAST 42ND ST NEWYORK,NY 10168		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	100
BOSTON FOOD BANK 70 SOUTH BAY AVE BOSTON,MA 02118		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	100
FIRST LITERACY 160 BOYLSTON ST BOSTON,MA 02116		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	100
HUMAN RIGHTS WATCH 350 FIFTH AVE NEWYORK,NY 10118		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	500
BOSTON HEALTHCARE FOR HOMELESS 780 ALBANY ST BOSTON,MA 02118		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	500
GREATER BOSTON LEGAL SERVICES 197 FRIEND ST BOSTON,MA 02114		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
MARTHA'S VINYARD'S MUSEUM PO BOX 1310 EDGARTOWN,MA 02539		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
FRIENDS OF MVR RADIO PO BOX 1148 VINEYARD HAVEN,MA 02568		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
Total				971,950

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
FOOTSTEPS 114 JOHN ST NEW YORK,NY 10272		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
UNIVERSITY OF CHICAGO 5235 SOUTH HARPER CT CHICAGO,IL 60615		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	100,000
CONEY ISLAND PREP CHARTER SCHOOL 294 AVE T BROOKLYN,NY 11223		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
ADOLESCENT CONSULTATION SERVICES 189 CAMBRIDGE ST CAMBRIDGE,MA 02141		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
Total				971,950

TY 2015 Accounting Fees Schedule

Name: THE ASHURST FOUNDATION
C/O ELIZABETH K POZEN
EIN: 20-6325176

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
HARTNETT & CO ,	2,900	2,900		

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2015 Gain/Loss from Sale of Other Assets Schedule

Name:

THE ASHURST FOUNDATION
C/O ELIZABETH K POZEN

EIN:

20-6325176

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
1700 BIOMED RLTY TR INC	2015-08	PURCHASE	2015-10		39,779	36,356			3,423	
1500 PROCTOR & GAMBLE CO	2013-04	PURCHASE	2015-08		115,190	116,856			-1,666	
1117 998 KRAFT FOOD GROUP INC	2004-12	DONATION	2015-07		18,447				18,447	

TY 2015 Investments Corporate Stock Schedule

Name: THE ASHURST FOUNDATION
C/O ELIZABETH K POZEN

EIN: 20-6325176

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ALTRIA GROUP INC	282,319	282,319
BCE INC COM NEW	4,310,069	4,310,069
CONOCOPHILLIPS	121,394	121,394
CYS INVTS INC COM	662,527	662,527
DEERE & COMPANY	122,032	122,032
EXXON MOBIL CORP	252,558	252,558
GENERAL ELECTRIC CO COM	168,210	168,210
GILEAD SCIENCES INC	397,677	397,677
GOLDMAN SACHS GROUP INC COM	188,340	188,340
HONEYWELL INTL INC	329,870	329,870
INTEL CORP COM	172,250	172,250
INTL BUSINESS MACHINES	72,251	72,251
JOHNSON & JOHNSON	195,168	195,168
JPMORGAN CHASE & CO	299,776	299,776
KRAFT FOODS INC CL A	81,346	81,346
MONDELEZ INTL INC	150,483	150,483
MONSANTO CO	226,596	226,596
NIELSEN HOLDINGS	866,760	866,760
NIKE INC	295,625	295,625
PFIZER INC COM	121,050	121,050
PHILIP MORRIS INTL INC	244,829	244,829
PROCTER & GAMBLE CO COM		
UNITED TECHNOLOGIES CORP	164,760	164,760
VERIZON COMMUNICATIONS INC	101,684	101,684
AVALONBAY CMNTYS INC COM	39,588	39,588
DIGITAL RLTY TR INC COM	41,591	41,591
UDR INC COM	41,327	41,327

TY 2015 Investments - Other Schedule**Name:** THE ASHURST FOUNDATION

C/O ELIZABETH K POZEN

EIN: 20-6325176

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ALPS ETF TR ALERIAN MLP EFT	FMV	346,076	346,076
DFA U.S. CORE EQUITY 1 PORTFOLIO	FMV	1,129,034	1,129,034
EATON VANCE FLOATING RATE INCOME TR	FMV	235,420	235,420
FIDELITY ADVISOR NEW INSIGHTS CL	FMV	479,720	479,720
FIDELITY FLOATING RATE HIGH INC	FMV	298,886	298,886
JPMORGAN CHASE & CO ALERIAN MLP INDE	FMV	127,468	127,468
POWERSHARES GLOBAL EXCHANGE	FMV	445,153	445,153
SELECT SECTOR SPDR TR UTILS	FMV	123,348	123,348
SPDR INDEX SHS FDS S&P INTL DIV	FMV	651,521	651,521
SPDR SER TR S&P REGL BKG	FMV	159,296	159,296
VANGUARD INDEX FDS VANGUARD REIT EFT	FMV	521,035	521,035
VANGUARD WORLD FDS VANGUARD CONSUMER	FMV	165,445	165,445
WISDOMTREE TR DIVID EX-FINANCIALS FD	FMV	1,052,243	1,052,243
WISDOMTREE TR EMERGING MKTS EQUITY	FMV	556,389	556,389
WISDOMTREE TR EUROPE SMALLCAP DIVID	FMV	662,200	662,200
WISDOMTREE TR MIDCAP DIVID FD	FMV	488,293	488,293
WISDOMTREE TR SMALLCAP EARNINGS FD	FMV	1,102,890	1,102,890

TY 2015 Other Decreases Schedule

Name: THE ASHURST FOUNDATION
C/O ELIZABETH K POZEN
EIN: 20-6325176

Description	Amount
CHANGE IN FAIR MARKET VALUE	1,723,680

TY 2015 Other Expenses Schedule

Name: THE ASHURST FOUNDATION
C/O ELIZABETH K POZEN
EIN: 20-6325176

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
STATE FILING FEES	500			

TY 2015 Other Income Schedule

Name: THE ASHURST FOUNDATION

C/O ELIZABETH K POZEN

EIN: 20-6325176

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
PERSHING LL - 434	10,107	10,107	

TY 2015 Other Professional Fees Schedule

Name: THE ASHURST FOUNDATION
C/O ELIZABETH K POZEN
EIN: 20-6325176

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FIRST REPUBLIC SECURITIES	33,624	33,624		

TY 2015 Taxes Schedule

Name: THE ASHURST FOUNDATION

C/O ELIZABETH K POZEN

EIN: 20-6325176

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL INCOME TAXES	11,994			
FOREIGN TAX WITHHELD	41,877	41,877		

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at <u>www.irs.gov/form990</u>.	OMB No 1545-0047
		2015

Name of the organization THE ASHURST FOUNDATION C/O ELIZABETH K POZEN	Employer identification number 20-6325176
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Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

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

Special Rules

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

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

Name of organization THE ASHURST FOUNDATION C/O ELIZABETH K POZEN	Employer identification number 20-6325176
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Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ROBERT C POZEN	\$ 200,000	Person ☒
	9 ARLINGTON STREET		Payroll ☐
	BOSTON, MA 021163410		Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)

Name of organization THE ASHURST FOUNDATION C/O ELIZABETH K POZEN	Employer identification number 20-6325176
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Part II **Noncash Property**
(see instructions) Use duplicate copies of Part II if additional space is needed

(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
 	 	 \$	
(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
 	 	 \$	
(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
 	 	 \$	
(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
 	 	 \$	
(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
 	 	 \$	
(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
 	 	 \$	

Name of organization THE ASHURST FOUNDATION C/O ELIZABETH K POZEN	Employer identification number 20-6325176
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Part III

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

Use duplicate copies of Part III if additional space is needed

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