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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 SIBLEY-SALTONSTALL CHARITABLE FOUNDATION		A Employer identification number 22-3208197	
Number and street (or P O box number if mail is not delivered to street address) 45 SCHOOL ST 5TH FLOOR		B Telephone number (see instructions) (617) 523-1635	
City or town, state or province, country, and ZIP or foreign postal code BOSTON, MA 021083204		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐ E If private foundation status was terminated under section 507(b)(1)(A), check here ☐ F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation			
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 3,971,576		J Accounting method ☐ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)	

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)	290,280			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	1,415	1,415		
	4 Dividends and interest from securities	78,743	75,870		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10 _____	-26,192			
	b Gross sales price for all assets on line 6a _____ 277,044				
	7 Capital gain net income (from Part IV, line 2)		0		
	8 Net short-term capital gain			0	
	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)				
	12 Total. Add lines 1 through 11	344,246	77,285		
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages		0	0	0
	15 Pension plans, employee benefits		0	0	
	16a Legal fees (attach schedule).				0
	b Accounting fees (attach schedule).	2,100	2,100	0	0
	c Other professional fees (attach schedule)	31,355	31,355		0
	17 Interest				0
	18 Taxes (attach schedule) (see instructions)	3,624	566		0
	19 Depreciation (attach schedule) and depletion	0	0		
	20 Occupancy				
	21 Travel, conferences, and meetings.		0	0	
	22 Printing and publications		0	0	
	23 Other expenses (attach schedule).				
	24 Total operating and administrative expenses. Add lines 13 through 23	37,079	34,021	0	0
	25 Contributions, gifts, grants paid	194,000			194,000
	26 Total expenses and disbursements. Add lines 24 and 25	231,079	34,021	0	194,000
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	113,167			
	b Net investment income (if negative, enter -0-)		43,264		
	c Adjusted net income (if negative, enter -0-)			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		964	964
	2	Savings and temporary cash investments	308,213	400,727	400,727
	3	Accounts receivable ▶ _____			
		Less allowance for doubtful accounts ▶ _____		0	0
	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)			
	b	Investments—corporate stock (attach schedule)	1,399,845	1,358,184	2,478,617
	c	Investments—corporate bonds (attach schedule)	401,526	501,178	499,965
	11	Investments—land, buildings, and equipment basis ▶ _____			
	Less accumulated depreciation (attach schedule) ▶ _____				
12	Investments—mortgage loans.				
13	Investments—other (attach schedule)	673,226	633,852	591,303	
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)	2,782,810	2,894,905	3,971,576	
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	2,782,810	2,894,905	
	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)	2,782,810	2,894,905	
31	Total liabilities and net assets/fund balances(see instructions)	2,782,810	2,894,905		

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	2,782,810
2	Enter amount from Part I, line 27a	2	113,167
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	2,895,977
5	Decreases not included in line 2 (itemize) ▶ _____	5	1,072
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	2,894,905

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	See Additional Data Table			
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 See Additional Data Table			
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 See Additional Data Table			
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	-26,192
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	196,299	3,667,721	0 053521
2013	82,883	3,181,731	0 02605
2012	176,264	2,754,162	0 063999
2011	173,662	2,510,690	0 069169
2010	71,444	2,410,940	0 029633

2	Total of line 1, column (d).	2	0 242372
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 048474
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	3,660,387
5	Multiply line 4 by line 3.	5	177,434
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	433
7	Add lines 5 and 6.	7	177,867
8	Enter qualifying distributions from Part XII, line 4.	8	194,000

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

3,254

b

Exempt foreign organizations—tax withheld at source

6b

c

Tax paid with application for extension of time to file (Form 8868).

6c

0

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** 450 **Refunded**

1

433

0

433

0

433

3,254

0

2,821

2,371

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):
FL

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

No

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?	13	Yes	
Website address				
14	WELCH & FORBES LLC The books are in care of C/O MICHAEL P BEAN Telephone no (617) 523-1635 Located at 45 SCHOOL STREET BOSTON MA BOSTON MA ZIP+4 02108			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here	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?	16	Yes	No
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				

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		
Organizations relying on a current notice regarding disaster assistance check here.				
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2015?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015?	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		No
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

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

5b

6b

6b		No
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7b

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 SALTONSTALL	TRUSTEES 1	0		
30 DRAKE LANE SCARBOROUGH, ME 04074				
N STEWART SALTONSTALL	TRUSTEE 1	0		
BOX 5384 ST MARYS, GA 31558				
EDWARD A HASLER	TRUSTEE 1	0		
PO BOX 983 ANNA MARIA, FL 34216				

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

[illegible]

Total number of other employees paid over \$50,000.	0
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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.		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 NONE	
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 NONE	
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	3,716,129
b	Average of monthly cash balances.	1b	0
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	3,716,129
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	3,716,129
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	55,742
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,660,387
6	Minimum investment return. Enter 5% of line 5.	6	183,019

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	183,019
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	433
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	433
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	182,586
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	182,586
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	182,586

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	194,000
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	194,000
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	433
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	193,567

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				182,586
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.			3,862	
b Total for prior years 2013 , 20__ , 20__		0		
3 Excess distributions carryover, if any, to 2015				
a From 2010.	0			
b From 2011.	0			
c From 2012.	0			
d From 2013.	0			
e From 2014.	0			
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2015 from Part XII, line 4 ▶ \$ 194,000				
a Applied to 2014, but not more than line 2a			3,862	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2015 distributable amount.				182,586
e Remaining amount distributed out of corpus	7,552			
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	7,552			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions). . .	0			
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a	7,552			
10 Analysis of line 9				
a Excess from 2011.	0			
b Excess from 2012.	0			
c Excess from 2013.	0			
d Excess from 2014.	0			
e Excess from 2015.	7,552			

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 organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

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))

NONE

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

Form 990-PF (2015)

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

Form **990-PF** (2015)

Enter gross amounts unless otherwise indicated

13 Total.	Add line 12, columns (b), (d), and (e).	13	53,966
(See worksheet in line 13 instructions to verify calculations)			

[illegible]

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

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)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
400 APACHE CORP		2005-01-24	2015-06-10
BANK OF AMERICA CORPORATION			2015-09-14
1400 CENOVUS ENERGY INC		2010-03-17	2015-06-10
1373 GOOGLE INC CL C COM		2011-04-26	2015-05-04
50000 JPMORGAN CHASE & CO JPMORGAN CHASE & CO SENIOR NOTE DTD 09/18/2		2009-09-28	2015-01-20
1000 LIFE TIME FITNESS INC		2014-05-15	2015-06-11
1200 PLAINS GP HLDGS LP SHS A REP		2014-09-17	2015-12-28
1200 PLAINS GP HLDGS LP SHS A REP		2015-09-02	2015-12-28
200 STRYKER CORP		2010-03-17	2015-09-02
800 SUNCOR ENERGY INC		2015-06-10	2015-12-29

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
23,476		20,947	2,529
766			766
23,296		34,066	-10,770
72		37	35
50,000		49,870	130
72,100		49,669	22,431
10,969		35,876	-24,907
10,969		22,682	-11,713
19,165		11,230	7,935
21,062		23,606	-2,544

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			2,529
			766
			-10,770
			35
			130
			22,431
			-24,907
			-11,713
			7,935
			-2,544

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

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)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
800 TERADATA CORP		2010-06-14	2015-09-02
1200 TRIMBLE NAVIGATION LTD		2012-10-11	2015-09-02
CAPITAL GAIN DIVIDENDS	P		

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
22,803		26,577	-3,774
21,913		28,676	-6,763
			453

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-3,774
			-6,763

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				
BIGELOW LABORATORY FOR OCEAN SCIENCES PO BOX 475 W BOOTHBAY HARBOR, ME 04575	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	2,500
ENVIRONMENTAL DEFENSE FUND 257 PARK AVENUE SOUTH NEW YORK, NY 10010	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	7,500
HANAHAUOLI SCHOOL 1922 MAKKI STREET Honolulu, HI 98622	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	2,500
ISLAND INSTITUTE PO BOX 648 ROCKLAND, ME 04841	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	5,000
NATIONAL AUDUBON SOCIETY 700 BROADWAY NEW YORK, NY 10003	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	3,500
NATIONAL TRUST FOR HISTORIC PRESERVATION 1785 MASS AVE NW WASHINGTON, DC 20036	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	5,000
NATURAL RESOURCES DEFENSE COUNCIL 40 W 20TH ST NEW YORK, NY 10011	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	2,000
NATURE CONSERVANCY 14 MAINE ST SUITE 401 BRUNSWICK, ME 04011	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	7,500
OCEAN CONSERVANCY 1300 19TH STREET NW SUITE 800 WASHINGTON, DC 20036	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	7,500
PROJECT GRACE PO BOX 6846 Scarborough, ME 04070	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	5,000
PUNAHOU SCHOOL 1601 PUNAHOU STREET Honolulu, HI 96822	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	2,500
Camp Ketcha 336 BLACK POINT ROAD Scarborough, ME 04074	NONE	PUBLIC	SCHOLARSHIP PURPOSES	5,000
SIERRA CLUB FOUNDATION 85 SECOND STREET SUITE 750 SAN FRANCISCO, CA 94105	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	3,000
UNITED WAY OF GREATER PORTLAND PO BOX 15200 PORTLAND, ME 04112	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	5,000
WORLD WILDLIFE FUND 1250 24TH NW WASHINGTON, DC 20037	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	2,500
Total				194,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
YALE UNIVERSITY PO BOX 2038 NEW HAVEN, CT 06521	NONE	PUBLIC	YALE ALUMNI FUND	3,000
FISHER HOUSE FOUNDATION 1401 ROCKVILLE PIKE SUITE 600 ROCKVILLE, MD 20852	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	5,000
NATURAL RESOURCES COUNCIL OF MAINE 3 WADE STREET AUGUSTA, ME 04330	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	5,000
Camp Sunshine 35 ACADI ROAD CISCO, ME 05015	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	5,000
COASTAL MAINE BOTANICAL GARDENS 132 BOTANICAL GARDENS DRIVE BOOTHBAY, ME 04537	NONE	PUBLIC	ANNUAL FUND	3,000
Brain and Behavior Research Foundation 90 PARK AVENUE New York, NY 10016	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	3,000
CASA of Larimer County 1610 S COLLEGE AVENUE Fort Collins, CO 80525	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	2,500
Child & Family Agency of Southeastrn Con 255 HEMPSTEAD STREET New London, CT 06320	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	2,000
Children Support Service Org CASA PO BOX 3047 Kingsland, GA 31548	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,500
Coastal Georgia Foundation 1626 FREDERICA ROAD St Simons Island, GA 31522	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	2,500
Colorado Beagle Rescue PO BOX 2704 Littleton, CO 801612704	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	2,500
Crohn's & Ulcerative Colitis Foundation PO BOX 1245 Albert Lea, MN 56007	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,000
Dana-Farber Cancer Institute Division of Development & The Jimmy Fund PO BOX 849168 Boston, MA 02284	NONE	PUBLIC	WEEI SUMMER TELETTHON	5,000
Erin's House for Grieving Children 5670 YMCA PARK DRIVE WEST Fort Wayne, IN 46835	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	4,000
Farnsworth Art Museum 16 MUSEUM STREET Rockland, ME 04841	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	5,000
Total				194,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Good Shepherd Food Bank PO BOX 1870 Auburn, ME 04211	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	5,000
Habitat For Humanity 270 PEACHTREE STREET NW Americus, GA 31709	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	5,000
Habitat For Humanity 302 SOUTH LEE STREET Kingsland, GA 31548	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,000
Harlem Children's Zone 35 EAST 125TH STREET New York, NY 10035	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	4,000
Help Hospitalized Veterans PO BOX 98088 Washington, DC 20090	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	5,000
Hole In The Wall Gang Fund 555 LONG WHARF DRIVE New Haven, CT 06511	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	4,000
Maine Medical Center 22 BRAMHALL STREET Portland, ME 04102	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	5,000
Make-A-Wish Colorado 7951 E MAPLEWOOD AVENUE Greenwood Village, CO 80111	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	2,500
Matthew's House 415 MASON COURT 1 Fort Collins, CO 80524	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	2,500
Riding To The Top 14 LILAC DRIVE Windham, ME 04062	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	5,000
Pine Tree Society PO BOX 518 Bath, ME 04530	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	5,000
Portland Museum of Art SEVEN CONGRESS SQUARE Portland, ME 04101	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	5,000
Preble Street 38 PREBLE STREET Portland, ME 04101	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	5,000
Riding To The Top 14 LILAC DRIVE Windham, ME 04062	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	5,000
Scarborough Land Trust PO BOX 1237 Scarborough, ME 04070	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	5,000
Total				194,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
St Jude Children's Research Hospital 262 DANNY THOMAS PLACE Memphis,TN 38105	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	2,000
St Marys Little Theatre 511 OSBORNE STREET St Marys,GA 31558	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,000
Rochester Area Community Foundation 500 EAST AVENUE Rochester,NY 14625	NONE	PUBLIC	THE ALGONQUIN CAMPSHIP	3,000
Root Cellar 94 WASHINGTON AVENUE Portland,ME 04101	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	5,000
Wounded Warrior Project PO BOX 758517 Topeka,KS 66675	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,000
NATIONAL WILDLIFE FEDERATION PO BOX 1583 MERRIFIELD,VA 221161583	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	2,000
Total.			3a	194,000

TY 2015 Accounting Fees Schedule

Name: SIBLEY-SALTONSTALL CHARITABLE FOUNDATION

EIN: 22-3208197

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION FEE	2,100	2,100		

TY 2015 Explanation of Non-Filing with Attorney General Statement

Name: SIBLEY-SALTONSTALL CHARITABLE FOUNDATION

EIN: 22-3208197

Statement: PRESENTLY EXEMPT FROM FLORIDA REPORTING

TY 2015 Investments Corporate Bonds Schedule**Name:** SIBLEY-SALTONSTALL CHARITABLE FOUNDATION**EIN:** 22-3208197

Name of Bond	End of Year Book Value	End of Year Fair Market Value
50000 MEDCO HEALTH SOLUTIONS	50,843	52,455
50000 JPMORGAN CHASE & CO SENI		
50000 CINTAS CORP NO.2 SR NOTE	50,098	50,198
50000 GOLDMAN SACHS GROUP INC	49,719	50,127
50000 AFLAC INC SENIOR NOTE	50,372	50,659
50000 CVS HEALTH CORP	50,201	50,242
50000 KENNAMETAL INC SR NT	50,206	48,656
50000 EBAY INC SR GLBL NT	49,522	49,201
50000 BECTON DICKINSON & CO	49,965	50,420
50000 FISERV INC SR GLBL NT	49,564	49,585
50000 WALGREEN CO SR NT	50,688	48,422

TY 2015 Investments Corporate Stock Schedule

Name: SIBLEY-SALTONSTALL CHARITABLE FOUNDATION
EIN: 22-3208197

Name of Stock	End of Year Book Value	End of Year Fair Market Value
700 SHS AFLAC INC	24,766	41,930
400 SHS APACHE CORP		
1000 SHS AUTOMATIC DATA PROCES	36,464	84,720
1200 SHS CARMAX INC	10,570	64,767
600 SHS CHEVRON CORP NEW	42,443	53,976
800 SHS DANHER CORP	20,753	74,304
1072 SHS IRON MOUNTAIN INC PA	16,913	28,955
800 SHS JOHNSON & JOHNSON	50,217	82,176
1500 SHS MICROSOFT CORP	40,030	83,220
400 SHS O'REILLY AUTOMATIVE I	6,579	101,368
800 SHS PEPSICO INC	36,779	79,936
700 SHS SCHLUMBERGER LTD	25,959	48,825
500 SHS STERICYCLE INC	11,818	60,300
600 SHS STRYKER CORP	31,755	55,764
700 SHS UNITED TECHNOLOGIES	11,113	67,249
300 SHS PERRIGO CO	45,662	43,410
1400 SHS WELLS FARGO & CO NEW	29,060	76,104
700 SHS CHURCH & DWIGHT CO	47,276	59,416
500 SHS CAPITAL ONE FINANCIAL	37,966	36,090
700 SHS ECHOLAB INC	30,814	80,066
500 SHS PROCTOR & GAMBLE CO	31,695	39,705
1200 SHS CVS HEALTH CORP	47,420	117,324
500 SHS PRAXAIR INC	36,594	51,200
800 SHS QUALCOMM INC	35,392	39,988
1500 SHS CONSTANT CONTACT INC	23,551	43,860
1400 SHS CENOVUS INC		
800 SHS HOME DEPOT INC	16,232	105,800
600 SHS MCDONALDS CORP	46,416	70,884
800 SHS TERADATA CORP		
1200 SHS VISA INC CLASS A	22,520	93,060

Name of Stock	End of Year Book Value	End of Year Fair Market Value
1200 SHS TORONTO DOMINION BANK	43,565	47,004
50 SHS GOOGLE INC CLASS A		
700 SHS APPLE INC	54,153	73,682
2000 SHS GENERAL ELERTRIC CO.	45,811	62,300
1000 SHS MERCK & CO INC	44,727	52,820
1200 SHS TRIMBLE NAVAGATION LT		
600 SHS CHECKPOINT SOFTWARE	39,838	48,828
400 SHS ANSYS	29,497	37,000
600 SHS JP MORGAN CHASE & CO	32,291	39,618
1000 SHS LIFETIME FITNESS		
200 SHS METTLER TOLEDO INTL	40,844	67,826
1000 SHS RESMED INC	46,617	53,690
50 SHS GOOGLE CL C COM		
700 SHS METLIFE INC	38,521	33,747
50 SHS ALPHABET INC CAP STK CL	13,305	37,944
50 SHS ALPHABET INC CAP STK CL	13,307	38,901
450 SHS FISERV INC	38,058	41,157
800 SHS SUNCOR ENERGY INC	23,606	20,640
125 SHS ALLERGAN PLC SHS	37,287	39,063

TY 2015 Investments - Other Schedule**Name:** SIBLEY-SALTONSTALL CHARITABLE FOUNDATION**EIN:** 22-3208197

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
900 SHS ISHARES MSCI EMERGING	AT COST	19,426	28,971
1250 SHS ISHARES IBOXX CORPORA	AT COST	135,046	142,513
1250 SHS ISHARES 1-3 YEAR	AT COST	130,807	130,750
1600 SHS VANGUARD INTERMEDIATE	AT COST	129,605	132,896
3600 SHS FIRST TRUST NORTH AME	AT COST	82,418	72,648
2500 SHS KAYNE ANDERSON MLP	AT COST	84,110	43,225
1200 SHS PLAINS GP HOLDINGS			
2000 SHS MANNING & NAPIER OVER	AT COST	52,440	40,300

TY 2015 Other Decreases Schedule

Name: SIBLEY-SALTONSTALL CHARITABLE FOUNDATION

EIN: 22-3208197

Description	Amount
OTHER ADJUSTMENT FOR MUTUAL FUND POSTINGS	1,072

TY 2015 Other Professional Fees Schedule

Name: SIBLEY-SALTONSTALL CHARITABLE FOUNDATION

EIN: 22-3208197

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	31,355	31,355		

TY 2015 Taxes Schedule

Name: SIBLEY-SALTONSTALL CHARITABLE FOUNDATION

EIN: 22-3208197

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	378	378		0
FEDERAL ESTIMATED TAX	3,058	0		0
FOREIGN TAXES ON QUALIFIED FOR	158	158		0
FOREIGN TAXES ON NONQUALIFIED	30	30		0

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
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Name of the organization SIBLEY-SALTONSTALL CHARITABLE FOUNDATION	Employer identification number 22-3208197
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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 SIBLEY-SALTONSTALL CHARITABLE FOUNDATION	Employer identification number 22-3208197
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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	SALTONSTALL CLUT	\$ 290,280	Person ☒
	45 SCHOOL STREET 5TH FLOOR		Payroll ☐
	BOSTON, MA 02108		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)

Employer identification number
22-3208197

Part II **Noncash Property**
(see instructions) Use duplicate copies of Part II if additional space is needed

[illegible]

Name of organization SIBLEY-SALTONSTALL CHARITABLE FOUNDATION	Employer identification number 22-3208197
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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	
	--		