



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



Form

990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.

▶ 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 BEVERIDGE FAMILY FOUNDATION INC		A Employer identification number 31-1698286	
Number and street (or P O box number if mail is not delivered to street address) 3 UPLAND LANE		Room/suite	B Telephone number (see instructions) (800) 229-9667
City or town, state or province, country, and ZIP or foreign postal code WEST NEWBURY, MA 01985		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		D 1. Foreign organizations, check here ▶ ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐	
IFair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 52,895,175		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐	
J Accounting method ☐ 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)				
	2 Check ▶ ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	1	1		
	4 Dividends and interest from securities	1,673,240	1,673,240		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	2,231,785			
	b Gross sales price for all assets on line 6a 28,715,760				
	7 Capital gain net income (from Part IV, line 2) . . .		2,231,785		
	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)				
	12 Total.Add lines 1 through 11	3,905,026	3,905,026		
	13 Compensation of officers, directors, trustees, etc	175,000	36,400		138,600
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits	43,170	8,978		34,192
	16a Legal fees (attach schedule).	14,730	7,365		7,440
	b Accounting fees (attach schedule).	52,554	26,277		26,274
	c Other professional fees (attach schedule)	380,684	373,362		8,222
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	70,966	36,966		0
	19 Depreciation (attach schedule) and depletion . . .	1,954	0		
	20 Occupancy	16,800	3,494		13,306
	21 Travel, conferences, and meetings.	69,928	14,544		55,384
	22 Printing and publications				
	23 Other expenses (attach schedule).	29,289	5,140		24,267
	24 Total operating and administrative expenses. Add lines 13 through 23	855,075	512,526		307,685
	25 Contributions, gifts, grants paid	2,959,964			2,959,964
	26 Total expenses and disbursements.Add lines 24 and 25	3,815,039	512,526		3,267,649
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	89,987			
	b Net investment income (if negative, enter -0-)		3,392,500		
	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	49,208	27,333	27,333
	2	Savings and temporary cash investments	2,337,280	1,576,935	1,576,935
	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	1,400	1,280	1,280
	10a	Investments—U S and state government obligations (attach schedule)	4,620,406	4,310,390	4,310,390
	b	Investments—corporate stock (attach schedule)	31,271,913	27,600,040	27,600,040
	c	Investments—corporate bonds (attach schedule)	6,918,152	8,420,582	8,420,582
	11	Investments—land, buildings, and equipment basis ▶ _____			
		Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans.			
	13	Investments—other (attach schedule)	11,814,655	10,860,537	10,860,537
	14	Land, buildings, and equipment basis ▶ _____ 16,437			
		Less accumulated depreciation (attach schedule) ▶ 15,797	2,594	640	640
	15	Other assets (describe ▶ _____)	105,830	97,438	97,438
	16	Total assets(to be completed by all filers—see the instructions Also, see page 1, item I)	57,121,438	52,895,175	52,895,175

Liabilities	17	Accounts payable and accrued expenses	38,728	32,699	
	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 ▶ _____)	47,250	4,000	
	23	Total liabilities(add lines 17 through 22)	85,978	36,699	

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	42,035,460	37,858,476	
	25	Temporarily restricted			
	26	Permanently restricted	15,000,000	15,000,000	
		Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances(see instructions)	57,035,460	52,858,476	
	31	Total liabilities and net assets/fund balances(see instructions)	57,121,438	52,895,175	

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	57,035,460
2	Enter amount from Part I, line 27a	2	89,987
3	Other increases not included in line 2 (itemize) ▶ _____	3	43,250
4	Add lines 1, 2, and 3	4	57,168,697
5	Decreases not included in line 2 (itemize) ▶ _____	5	4,310,221
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	52,858,476

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)
1 a	SALE OF PUBLICLY TRADED SECURITIES			
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 28,715,760		26,483,975	2,231,785
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			2,231,785
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	2,231,785
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	2,788,698	57,245,843	0 048714
2013	2,474,182	53,653,790	0 046114
2012	1,988,268	49,793,996	0 039930
2011	2,297,903	49,989,663	0 045968
2010	2,119,079	47,454,243	0 044655

2	Total of line 1, column (d).	2	0 225381
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 045076
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	55,399,271
5	Multiply line 4 by line 3.	5	2,497,178
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	33,925
7	Add lines 5 and 6.	7	2,531,103
8	Enter qualifying distributions from Part XII, line 4.	8	3,267,649

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

53,345

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** 19,420 **Refunded**

1	33,925
2	0
3	33,925
4	0
5	33,925
7	53,345
8	
9	
10	19,420
11	0

Part VII-A

Statements Regarding Activities

1a

During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?

1b

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.

1c

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

2

Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year

(1) On the foundation \$ _____ 0 (2) On foundation managers \$ _____ 0

3

Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ _____ 0

4

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.

5

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

6

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

7

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

8

Was there a liquidation, termination, dissolution, or substantial contraction during the year?

If "Yes," attach the statement required by General Instruction T.

9

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?

10

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.

11

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

MA

12

If the answer is "Yes" to line 11, 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 .

13

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

14

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

1a	Yes	No
1b		No
1c		No
2		No
3		No
4a		No
4b		
5		No
6	Yes	
7	Yes	
8b	Yes	
9		No
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 WWW BEVERIDGE ORG	13	Yes	
14	The books are in care of GMA FOUNDATIONS Telephone no (617) 426-7080 Located at 77 SUMMER STREET 8TH FLOOR BOSTON MA ZIP+4 02110			
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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days).	☐ Yes ☒ No ☐ Yes ☒ No ☐ Yes ☒ No ☒ Yes ☐ No ☐ Yes ☒ No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here.		1b	No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2015?		1c	No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? If "Yes," list the years 20 , 20 , 20 , 20	☐ Yes ☒ No		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).		2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No		
b	If "Yes," did it have excess business holdings in 2015 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015.).		3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a	No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?		4b	No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (Continued)

5a

During the year did the foundation pay or incur any amount to

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

b

If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b

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?

6b

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?

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
See Additional Data Table				

2

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

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

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

0

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
BRANDES INVESTMENT PARTNERS 11988 EL CAMINO REAL 600 SAN DIEGO, CA 92130	INVESTMENT MANAGEMENT	105,522
NFJ INVESTMENT GROUP LLC 1633 BROADWAY NEW YORK, NY 10019		
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	
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	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3	0

Part X

Minimum Investment Return

(All domestic foundations must complete this part. Foreign foundations,see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	54,443,716
b	Average of monthly cash balances.	1b	1,799,199
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	56,242,915
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	56,242,915
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	843,644
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	55,399,271
6	Minimum investment return. Enter 5% of line 5.	6	2,769,964

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	2,769,964
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	33,925
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	33,925
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	2,736,039
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	2,736,039
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	2,736,039

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	3,267,649
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	3,267,649
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	33,925
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	3,233,724

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				2,736,039
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2015				
a From 2010.				
b From 2011.				
c From 2012.				
d From 2013.				
e From 2014.				11,207
f Total of lines 3a through e.	11,207			
4 Qualifying distributions for 2015 from Part XII, line 4 ▶ \$ 3,267,649				
a Applied to 2014, but not more than line 2a			0	
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.				2,736,039
e Remaining amount distributed out of corpus	531,610			
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	542,817			
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.	542,817			
10 Analysis of line 9				
a Excess from 2011.				
b Excess from 2012.				
c Excess from 2013.				
d Excess from 2014.				11,207
e Excess from 2015.				531,610

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	Tax year	Prior 3 years			(e) Total
		(a) 2015	(b) 2014	(c) 2013	(d) 2012	
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))

b

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

2

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

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

a

The name, address, and telephone number or e-mail address of the person to whom applications should be addressed
WARD CASWELL
3 UPLAND LANE
WEST NEWBURY, MA 01985
(800) 229-9667
WARD@CASWELL.ORG

b

The form in which applications should be submitted and information and materials they should include
APPLICANTS SHOULD SUBMIT THE PROPOSAL ABSTRACT PROVIDED BY THE FOUNDATION ALONG WITH THE FOLLOWING REQUIRED DOCUMENTS 1)COPY OF IRS LETTER CLASSIFYING THE APPLICANT AS EXEMPT UNDER CODE SECTIONS 509(A) & 501(C)(3),2)COPY OF 990 FOR THE MOST RECENT TWO YEARS,3)THREE CONSTRUCTION BIDS, IF CONSTRUCTION PROJECT,4)NAMES AND AFFILIATIONS OF THE BOARD MEMBERS,5)IF HOSPITAL OR OTHER HEALTH-RELATED FACILITY, A COPY OF THE DETERMINATION OF NEED (DON) OR A CERTIFICATE OF NEED (CON), 6)MOST RECENT AUDITED FINANCIAL STATEMENTS, IF APPLICABLE,7)NAME AND QUALIFICATIONS OF THE PERSON RESPONSIBLE FOR ADMINISTERING THE GRANT,8)DETAILED BUDGET OF THE PROJECT,9)LIST OF OTHER SOURCES OF FUNDING FOR THIS PROJECT,10)A STATEMENT THAT THE GRANT REQUEST IS EXECUTED BY A PERSON AUTHORIZED TO SUBMIT ON BEHALF OF THE REQUESTING ORGANIZATION,11)TABLE OF ORGANIZATION,12)IF A UNIT OF GOVERNMENT, EVIDENCE OF THE RELATIONSHIP

c

Any submission deadlines
DUE DATE FOR RECEIPT OF COMPLETE PROPOSALS IS 5:00 PM ON FEBRUARY 1 AND AUGUST 1 OF EACH YEAR

d

Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors
REJECTED PROGRAM ACTIVITIES: INTERNATIONAL AFFAIRS, MEMBER BENEFIT. REJECTED TYPES OF SUPPORT: AWARDS/PRIZES/COMPETITIONS, COLLECTIONS MGMT, COMMISSIONING NEW WORKS, CONFERENCES/SEMINARS, CURRICULUM DEVELOPMENT, DEBT REDUCTION, EMPLOYEE MATCHING GIFTS, EMPLOYEE-BASED SCHOLARSHIPS, ENDOWMENT FUNDS, FACULTY/STAFF DEVELOPMENT, FELLOWSHIPS, FILM/VIDEO/RADIO PRODUCTION, FOUNDATION ADMINISTERED PROGRAMS, GENERAL/OPERATING SUPPORT, GRANTS/SCHOLARSHIPS TO INDIVIDUALS, INCOME DEVELOPMENT, INTERNSHIP FUNDS, MANAGEMENT DEVELOPMENT, PERFORMANCE/PRODUCTION COSTS, PROFESSORSHIPS, PROGRAM-RELATED INVESTMENT/LOANS, STUDENT AID. MAXIMUM GRANT AMOUNT REQUESTED SHOULD NOT EXCEED 25% OF THE TOTAL CONTRIBUTIONS FOR THE MOST RECENTLY ENDED FISCAL YEAR, OR 20% OF THE PROJECT BUDGET. APPROVED AREAS OF GIVING INCLUDE: HAMPDEN & HAMPSHIRE COUNTIES, MA.

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	2,959,964
b Approved for future payment				
Total			3b	0

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	1		
4 Dividends and interest from securities. . . .			14	1,673,240		
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.						
8 Gain or (loss) from sales of assets other than inventory			18	2,231,785		
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). . .		0		3,905,026		0
13 Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations)			13		3,905,026	

[illegible]

l. Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

(1) Cash.

(2) Other assets.

b Other transactions

(1) Sales of assets to a noncharitable exempt organization.

(2) Purchases of assets from a noncharitable exempt organization.

(3) Rental of facilities, equipment, or other assets.

(4) Reimbursement arrangements.

(5) Loans or loan guarantees.

(6) Performance of services or membership or fundraising solicitations.

c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule

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

* * * * *

2016-04-25

* * * * *

Signature of officer or trustee

Date

Title

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

Paid	Firm's name
Preparer	EDELSTEIN AND COMPANY LLP

Firm's address 160 FEDERAL STREET 9TH FLOOR BOSTON, MA 02110

Firm's EIN 04-2442519

Phone no (617) 227-6161

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation(If not paid, enter -0-)	Contributions to employee benefit plans and deferred compensation (d)	Expense account, (e) other allowances
WARD S CASWELL	PRESIDENT/DIRECTOR 40 00	175,000	32,810	0
3 UPLAND LANE WEST NEWBURY,MA 01985				
PHILIP CASWELL	V P /DIRECTOR 0 50	0	0	0
3902 N LONGVIEW DR JUPITER,FL 33477				
RUTH S DUPONT	TREASURER/DIRECTOR 0 50	0	0	0
409 GOLF COURSE COURT ARNOLD,MD 21012				
LEAH BEVERIDGE RICHARDSON	CLERK/DIRECTOR 0 50	0	0	0
24 KNAPP STREET SOMERVILLE,MA 02143				
ALFRED L GRIGGS	ASST CLERK/DIRECTOR 0 50	0	0	0
9 BARRETT PLACE NORTHAMPTON,MA 01060				
CHRISTA PALMER BIGUE	DIRECTOR 0 50	0	0	0
507 AVENUE CARILLO HALF MOON BAY,CA 94019				
CAROL A LEARY PHD	DIRECTOR 0 50	0	0	0
896 LONGMEADOW STREET LONGMEADOW,MA 01106				
PETER WESTON	DIRECTOR 0 50	0	0	0
44 BUTTERNUT ROAD WESTFIELD,MA 01085				
JILLIAN L HICKERSON	DIRECTOR 0 50	0	0	0
629 SOUTH NEVADA STREET OCEANSIDE,CA 92054				
ELIZABETH S KIRKPATRICK	DIRECTOR 0 50	0	0	0
379 FELDSPAR ROAD BLACK HAWK,CO 80422				
IAN CAMPBELL PALMER	DIRECTOR 0 50	0	0	0
302 MAPLE LANE SEVERNA PARK,MD 21146				
JOSEPH BEVERIDGE PALMER	DIRECTOR 0 50	0	0	0
192 MIDDLE ROAD PO BOX 187 CENTER SANDWICH,NH 03227				
FREDERICK WILLIAM STECHER	DIRECTOR 0 50	0	0	0
3539 GUNDRY AVENUE LONG BEACH,CA 90807				
JONATHAN CASWELL	DIRECTOR 0 50	0	0	0
8420 CANYON RIM TRAIL 303 ENGLEWOOD,CO 80112				
ALEXANDER CASWELL	DIRECTOR 0 50	0	0	0
615 REEDS BRIDGE ROAD CONWAY,MA 01341				

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				
AMERICAN RED CROSS OF WESTERN MASSACHUSETTS 150 BROOKDALE ST SPRINGFIELD,MA 01104	N/A	PC	PROGRAM SUPPORT	5,000
ARGENZIANO SCHOOL PTA 290 WASHINGTON ST SOMERVILLE,MA 02143	N/A	PC	PROGRAM SUPPORT	5,000
BABY BASICS INC 47 BEAUFORT AVE NEEDHAM,MA 02492	N/A	PC	PROGRAM SUPPORT	5,000
BAY PATH UNIVERSITY 588 LONGMEADOW ST LONGMEADOW,MA 01106	N/A	PC	PROGRAM SUPPORT	60,000
BEHAVIORAL HEALTH NETWORK INC 417 LIBERTY ST STE 1 SPRINGFIELD,MA 01104	N/A	PC	PROGRAM SUPPORT	7,000
BIG BROTHERSBIG SISTERS OF HAMPDEN COUNTY 101 STATE ST STE 601 SPRINGFIELD,MA 01103	N/A	PC	PROGRAM SUPPORT	13,000
BOY SCOUTS OF AMERICA 1 ARCH RD STE 5 WESTFIELD,MA 01085	N/A	PC	PROGRAM SUPPORT	21,800
BOYS & GIRLS CLUB FAMILY CENTER INC 100 ACORN ST SPRINGFIELD,MA 01109	N/A	PC	PROGRAM SUPPORT	5,000
BOYS & GIRLS CLUB OF GREATER HALF MOON BAY PO BOX 545 HALF MOON BAY,CA 94019	N/A	PC	PROGRAM SUPPORT	5,000
BOYS & GIRLS CLUB OF WESTFIELD INC 28 W SILVER STREET PO BOX 128 WESTFIELD,MA 01086	N/A	PC	PROGRAM SUPPORT	30,000
CARLSBAD HIGH SCHOOL TELEVISION BOOSTER CLUB 3557 LANCER WAY CARLSBAD,CA 92008	N/A	PC	PROGRAM SUPPORT	2,500
CARLSBAD SOFTBALL ASSOCIATION PO BOX 2726 CARLSBAD,CA 92018	N/A	PC	PROGRAM SUPPORT	2,500
CENTER FOR ECOLOGICAL TECHNOLOGY INC 112 ELM ST PITTSFIELD,MA 01201	N/A	PC	PROGRAM SUPPORT	25,000
CENTER FOR HUMAN DEVELOPMENT INC 332 BIRNIE AVENUE SPRINGFIELD,MA 01107	N/A	PC	PROGRAM SUPPORT	24,000
CHESAPEAKE BAY FOUNDATION INC 6 HERNDON AVE ANNAPOLIS,MD 21403	N/A	PC	PROGRAM SUPPORT	10,000
Total  3a				2,959,964

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				
CHESAPEAKE REGION ACCESSIBLE BOATING INC PO BOX 6564 ANNAPOLIS, MD 21403	N/A	PC	PROGRAM SUPPORT	5,000
CHILDRENS CHORUS OF SPRINGFIELD 61 SUMNER AVE SPRINGFIELD, MA 01108	N/A	PC	PROGRAM SUPPORT	5,000
CHILDRENS INSTITUTE INC 2121 WEST TEMPLE ST LOS ANGELES, CA 90026	N/A	PC	PROGRAM SUPPORT	6,000
CHOATE ROSEMARY HALL FOUNDATION INCORPORATED 333 CHRISTIAN ST WALLINGFORD, CT 06492	N/A	PC	PROGRAM SUPPORT	1,000
CHOPIN FOUNDATION OF THE UNITED STATES INC 440 79TH ST CSWY STE 117 MIAMI, FL 33141	N/A	PC	PROGRAM SUPPORT	5,000
CHURCH OF THE ATONEMENT (EPISCOPAL) 36 COURT ST WESTFIELD, MA 01085	N/A	PC	PROGRAM SUPPORT	11,600
CLARKE SCHOOL FOR THE DEAF 47 ROUND HILL RD NORTHAMPTON, MA 01060	N/A	PC	PROGRAM SUPPORT	25,000
COMMUNITY INVOLVED IN SUSTAINING AGRICULTURE INC 1 SUGARLOAF ST 2ND FLR SOUTH DEERFIELD, MA 01373	N/A	PC	PROGRAM SUPPORT	20,000
COMMUNITY UNITED WAY OF PIONEER VALLEY INC 1441 MAIN ST STE 147 SPRINGFIELD, MA 01103	N/A	PC	PROGRAM SUPPORT	15,000
CONCORD HOSPITAL INC 250 PLEASANT ST CONCORD, NH 03301	N/A	PC	PROGRAM SUPPORT	5,000
CONGREGATION OF THE SISTERS OF SAINT JOSEPH OF SPRINGFIELD 577 CAREW ST SPRINGFIELD, MA 01040	N/A	PC	PROGRAM SUPPORT	5,000
DELORES PROJECT POBOX 1406 DENVER, CO 80201	N/A	PC	PROGRAM SUPPORT	3,250
DEVELOP SPRINGFIELD CORPORATION 1182 MAIN ST SPRINGFIELD, MA 01103	N/A	PC	PROGRAM SUPPORT	30,000
DOMUS INCORPORATED 4 SCHOOL ST WESTFIELD, MA 01085	N/A	PC	PROGRAM SUPPORT	16,000
DRAMA STUDIO INC PO BOX 80892 SPRINGFIELD, MA 01138	N/A	PC	PROGRAM SUPPORT	5,000
Total  3a				2,959,964

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				
DUNN SCHOOL PO BOX 98 LOS OLIVOS,CA 93441	N/A	PC	PROGRAM SUPPORT	15,000
ENCHANTED CIRCLE INC 4 OPEN SQUARE WAY HOLYOKE,MA 01040	N/A	PC	PROGRAM SUPPORT	10,000
ENVIRONMENTAL LEARNING FOR KIDS 6060 BROADWAY DENVER,CO 80216	N/A	PC	PROGRAM SUPPORT	5,000
EPISCOPAL CHURCH OF THE GOOD SHEPHERD OF TEQUESTA INC 400 SEABROOK RD TEQUESTA,FL 33649	N/A	PC	PROGRAM SUPPORT	5,000
FIDELCO GUIDE DOG FOUNDATION INC 103 VISION WAY BLOOMFIELD,CT 06002	N/A	PC	PROGRAM SUPPORT	5,000
FIRST UNIVERSALIST CHURCH OF DENVER 4101 E HAMPDEN AVE DENVER,CO 80218	N/A	PC	PROGRAM SUPPORT	3,250
FLORENCE CRITTENDON SERVICES OF COLORADO 96 SOUTH ZUNI ST DENVER,CO 80223	N/A	PC	PROGRAM SUPPORT	5,000
FOUNDATION CENTER 32 OLD SLIP NEW YORK,NY 10005	N/A	PC	PROGRAM SUPPORT	5,000
FRIENDS OF HOSPICE HOUSE INC 1165 N PLEASANT ST AMHERST,MA 01002	N/A	PC	PROGRAM SUPPORT	35,000
FRIENDS OF THE HALF MOON LIBRARY 620 CORREAS ST HALF MOON BAY,CA 94019	N/A	PC	PROGRAM SUPPORT	5,000
GIRLS SCOUTS OF CENTRAL AND WESTERN MASSACHUSETTS 81 GOLD STAR BLVD WORCESTER,MA 01606	N/A	PC	PROGRAM SUPPORT	5,000
GORDON SCHOOL 45 MAXFIELD AVE EAST PROVIDENCE,RI 02914	N/A	PC	PROGRAM SUPPORT	20,000
GROUNDWORK SOMERVILLE INC 24 PARK ST 7 SOMERVILLE,MA 02143	N/A	PC	PROGRAM SUPPORT	2,500
HABITAT FOR HUMANITY INTERNATIONAL INC 104 MEMORIAL AVE W SPRINGFIELD,MA 01089	N/A	PC	PROGRAM SUPPORT	3,200
HAP INC 322 MAIN ST STE 1 SPRINGFIELD,MA 01105	N/A	PC	PROGRAM SUPPORT	5,000
Total  3a				2,959,964

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				
HILLTOWN COMMUNITY AMBULANCE ASSOCIATION INC 1 BROMLEY RD HUNTINGTON,MA 01050	N/A	PC	PROGRAM SUPPORT	10,000
HILLTOWN LAND TRUST INC 332 BULLIT RD ASHFIELD,MA 01330	N/A	PC	PROGRAM SUPPORT	5,000
HITCHCOCK CENTER INC 525 S PLEASANT ST AMHERST,MA 01002	N/A	PC	PROGRAM SUPPORT	40,000
HOPE AND COMFORT INC PO BOX 241 NEWTON UPPER FALLS,MA 02464	N/A	PC	PROGRAM SUPPORT	2,500
HOSPICE OF PALM BEACH COUNTY FOUNDATION INC 5300 EAST AVE WEST PALM BEACH,FL 33407	N/A	PC	PROGRAM SUPPORT	5,000
HUMAN DEVELOPMENT CORPORATION 664 E CENTRAL AVE EDGEWATER,MD 21037	N/A	PC	PROGRAM SUPPORT	14,000
INFINITE LEARNING 214 MAIN ST EL SEGUNDO,CA 90245	N/A	PC	PROGRAM SUPPORT	5,000
INSIGHT PRODUCTIONS INC PO BOX 96 MARLBORO,VT 05344	N/A	PC	PROGRAM SUPPORT	20,000
INTERNATIONAL LANGUAGE INSTITUTE OF MASSACHUSETTS INC 25 NEW SOUTH ST NORTHAMPTON,MA 01060	N/A	PC	PROGRAM SUPPORT	5,000
JUNIOR ACHIEVEMENT OF WESTERN MASSACHUSETTS PO BOX 15167 SPRINGFIELD,MA 01115	N/A	PC	PROGRAM SUPPORT	25,000
JUPITER MEDICAL CENTER FOUNDATION INC 1210 S OLD DIXIE HWY JUPITER,FL 33458	N/A	PC	PROGRAM SUPPORT	5,000
LEADERSHIP PIONEER VALLEY 1 FEDERAL ST BLDG 1 SPRINGFIELD,MA 01105	N/A	PC	PROGRAM SUPPORT	5,000
LEARNING SOURCE 455 SOUTH PIERCE ST LAKEWOOD,CO 80226	N/A	PC	PROGRAM SUPPORT	5,000
LINK TO LIBRARIES INC 35 BLUEGRASS DR E LONGMEADOW,MA 01028	N/A	PC	PROGRAM SUPPORT	3,500
LOWELLS MARITIME FOUNDATION 459 MAIN ST AMESBURY,MA 01913	N/A	PC	PROGRAM SUPPORT	10,000
Total				2,959,964

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				
LUDLOW BOYS & GIRLS CLUB INC 96 CLAUDIAS WAY LUDLOW,MA 01056	N/A	PC	PROGRAM SUPPORT	27,500
MAGNOLIA ELEMENTARY PTA 1905 MAGNOLIA AVE CARLSBAD,CA 92008	N/A	PC	PROGRAM SUPPORT	6,840
MARY HITCHCOCK MEMORIAL HOSPITAL 1 MEDICAL CENTER DRIVE LEBANON,NH 03756	N/A	PC	PROGRAM SUPPORT	5,000
MASSACHUSETTS SOCIETY FOR THE PREVENTION OF CRUELTY TO CHILDREN 350 S HUNTINGTON AVENUE BOSTON,MA 02130	N/A	PC	PROGRAM SUPPORT	5,000
MASSACHUSETTS SOCIETY FOR THE PREVENTION OF CRUELTY TO CHILDREN 3815 WASHINGTON STREET BOSTON,MA 02130	N/A	PC	PROGRAM SUPPORT	15,000
MENTAL HEALTH ASSOCIATION OF GREATER SPRINGFIELD 995 WORTHINGTON ST SPRINGFIELD,MA 01109	N/A	PC	PROGRAM SUPPORT	40,000
MOUNT WASHINGTON VALLEY CHORAL SOCIETY PO BOX 5002 PMB 207 NORTH CONWAY,NH 03860	N/A	PC	PROGRAM SUPPORT	5,000
NAMI WESTERN MASSACHUSETTS INC 324A SPRINGFIELD ST AGAWAM,MA 01001	N/A	PC	PROGRAM SUPPORT	2,500
NATIONAL CONFERENCE FOR COMMUNITY & JUSTICE OF CT AND WESTERN MA 820A PROSPECT HILL ROAD WINDSOR,CT 06095	N/A	PC	PROGRAM SUPPORT	1,000
NORTHAMPTON COMMUNITY ARTS TRUST INC 44 MONROE ST NORTHAMPTON,MA 01060	N/A	PC	PROGRAM SUPPORT	35,000
NORTHAMPTON COMMUNITY MUSIC CENTER INC 139 SOUTH ST NORTHAMPTON,MA 01060	N/A	PC	PROGRAM SUPPORT	15,000
NORTHAMPTON HISTORICAL SOCIETY 46 BRIDGE ST NORTHAMPTON,MA 01060	N/A	PC	PROGRAM SUPPORT	5,000
NUESTRAS RAICES 329 MAIN ST HOLYOKE,MA 01040	N/A	PC	PROGRAM SUPPORT	13,000
NUTSHELL PLAYHOUSE INC 76 BRUNELL AVE LENOX,MA 01240	N/A	PC	PROGRAM SUPPORT	500
OPERATION OUTREACH-USA INC 360 WOODLAND ST STE 2 HOLLISTON,MA 01746	N/A	PC	PROGRAM SUPPORT	10,000
Total				2,959,964

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				
PARTNERS FOR YOUTH WITH DISABILITIES 95 BERKELEY ST STE 109 BOSTON,MA 02116	N/A	PC	PROGRAM SUPPORT	10,000
PEACE DEVELOPMENT FUND INC 499 DWIGHT ST HOLYOKE,MA 01040	N/A	PC	PROGRAM SUPPORT	15,000
PENNSYLVANIA ASSOCIATION FOR RETARDED CHILDREN & ADULTS 2649 TROUSDALE DR BURLINGAME,CA 94010	N/A	PC	PROGRAM SUPPORT	5,000
PIONEER VALLEY SYMPHONY INC 91 MAIN ST GREENFIELD,MA 01301	N/A	PC	PROGRAM SUPPORT	2,500
PLANNED PARENTHOOD LEAGUE OF MASSACHUSETTS INC 1055 COMMONWEALTH AVE BOSTON,MA 02215	N/A	PC	PROGRAM SUPPORT	30,000
POLISH CENTER OF DISCOVERY AND LEARNING INC 33 SOUTH ST CHICOPEE,MA 01013	N/A	PC	PROGRAM SUPPORT	5,000
PTA CALIFORNIA CONGRESS OF TEACHERS & STUDENTS INC 1645 MAGNOLIA AVENUE CARLSBAD,CA 92008	N/A	PC	PROGRAM SUPPORT	8,160
RAISING A READER MASSACHUSETTS 9B HAMILTON PL BOSTON,MA 02108	N/A	PC	PROGRAM SUPPORT	15,000
READER TO READER INC 38 WOODSIDE AVE AMHERST,MA 01002	N/A	PC	PROGRAM SUPPORT	5,000
RISE ABOVE FOUNDATION PO BOX 174 NORTHBRIDGE,MA 01534	N/A	PC	PROGRAM SUPPORT	15,000
RIVERSIDE INDUSTRIES INC ONE COTTAGE ST EASTHAMPTON,MA 01027	N/A	PC	PROGRAM SUPPORT	20,500
SAFE PASSAGE INC 43 CENTER ST NORTHAMPTON,MA 01060	N/A	PC	PROGRAM SUPPORT	14,000
SANDWICH COMMUNITY SCHOOL INC 1164 BUNKER HILL RD SOUTH TAMWORTH,NH 03883	N/A	PC	PROGRAM SUPPORT	5,000
SECOND CHANCE ANIMAL SHELTER INC 111 YOUNG RD E BROOKFIELD,MA 01515	N/A	PC	PROGRAM SUPPORT	10,000
SEVENARS CONCERTS INC 30 E END AVE 3A NEW YORK,NY 10028	N/A	PC	PROGRAM SUPPORT	5,000
Total			3a	2,959,964

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>				
SHAKA FRANKLIN FOUNDATION FOR YOUTH 8101 E DARTMOUTH AVE 11 DENVER,CO 80231	N/A	PC	PROGRAM SUPPORT	5,000
SIBLING CONNECTIONS INC 61 ROSELAND ST UNIT 2 SOMERVILLE,MA 02145	N/A	PC	PROGRAM SUPPORT	5,000
SOLDIER ON INC 421 N MAIN ST BLDG 6 LEEDS,MA 01053	N/A	PC	PROGRAM SUPPORT	20,000
SPRINGFIELD BOYS CLUB 481 CAREW ST SPRINGFIELD,MA 01104	N/A	PC	PROGRAM SUPPORT	30,000
SPRINGFIELD SCHOOL VOLUNTEERS INC 1550 MAIN ST SPRINGFIELD,MA 01103	N/A	PC	PROGRAM SUPPORT	5,000
SPRINGFIELD SYMPHONY ORCHESTRA 75 MARKET PL SPRINGFIELD,MA 01103	N/A	PC	PROGRAM SUPPORT	5,000
ST GEORGES CENTER INC PO BOX 10584 21 WEST 22ND ST WEST PALM BEACH,FL 33419	N/A	PC	PROGRAM SUPPORT	5,000
ST MATTHEWS CATHOLIC SCHOOL 910 S EL CAMINO REAL SAN MATEO,CA 94402	N/A	PC	PROGRAM SUPPORT	5,000
STANLEY PARK OF WESTFIELD INC 400 WESTERN AVE WESTFIELD,MA 01085	N/A	PC	PROGRAM SUPPORT	1,692,864
TEACH FOR AMERICA INC 315 W 36TH ST FL 8 NEW YORK,NY 10018	N/A	PC	PROGRAM SUPPORT	10,000
THE FOOD BANK OF WESTERN MASSACHUSETTS INC 97 N HATFIELD RD PO BOX 160 HATFIELD,MA 01038	N/A	PC	PROGRAM SUPPORT	35,000
THE HAROLD GRINSPOON CHARITABLE FOUNDATION 380 UNION ST WEST SPRINGFIELD,MA 01089	N/A	PC	PROGRAM SUPPORT	5,000
THIRD SECTOR NEW ENGLAND INC 89 SOUTH ST STE 700 BOSTON,MA 02111	N/A	PC	PROGRAM SUPPORT	10,000
TREEHOUSE FOUNDATION INC 1 TREEHOUSE CIRCLE EASTHAMPTON,MA 01027	N/A	PC	PROGRAM SUPPORT	28,000
TRUSTEES OF TUFTS COLLEGE 200 BOSTON AVE STE 1650 MEDFORD,MA 02155	N/A	PC	PROGRAM SUPPORT	5,000
Total				2,959,964

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>				
TRUSTEES OF WESTMINSTER SCHOOL INC 995 HOPMEADOW STREET SIMSBURY,CT 06070	N/A	PC	PROGRAM SUPPORT	5,000
U S S MASSACHUSETTS MEMORIAL COMMITTEE INC 5 BATTLESHIP COVE FALL RIVER,MA 02721	N/A	PC	PROGRAM SUPPORT	5,000
WESTFIELD MUSEUM INC 360 ELM ST WESTFIELD,MA 01085	N/A	PC	PROGRAM SUPPORT	15,000
WESTFIELD ON WEEKENDS INC 59 COURT ST WESTFIELD,MA 01085	N/A	PC	PROGRAM SUPPORT	5,000
YMCA OF GREATER WESTFIELD INC 67 COURT ST WESTFIELD,MA 01085	N/A	PC	PROGRAM SUPPORT	45,000
Total			3a	2,959,964

TY 2015 Accounting Fees Schedule

Name: THE BEVERIDGE FAMILY FOUNDATION INC

EIN: 31-1698286

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	52,554	26,277		26,274

TY 2015 Investments Corporate Bonds Schedule

Name: THE BEVERIDGE FAMILY FOUNDATION INC

EIN: 31-1698286

Name of Bond	End of Year Book Value	End of Year Fair Market Value
UBS - FIXED INCOME SECURITIES	8,420,582	8,420,582

TY 2015 Investments Corporate Stock Schedule

Name: THE BEVERIDGE FAMILY FOUNDATION INC

EIN: 31-1698286

Name of Stock	End of Year Book Value	End of Year Fair Market Value
UBS - CORPORATE STOCK	27,600,040	27,600,040

TY 2015 Investments Government Obligations Schedule

Name: THE BEVERIDGE FAMILY FOUNDATION INC

EIN: 31-1698286

US Government Securities - End of

Year Book Value:

4,310,390

US Government Securities - End of

Year Fair Market Value:

4,310,390

**State & Local Government
Securities - End of Year Book**

Value:

0

**State & Local Government
Securities - End of Year Fair**

Market Value:

0

TY 2015 Investments - Other Schedule

Name: THE BEVERIDGE FAMILY FOUNDATION INC

EIN: 31-1698286

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
UBS - FIXED INCOME MUTUAL FUNDS	FMV	10,860,537	10,860,537

TY 2015 Land, Etc. Schedule

Name: THE BEVERIDGE FAMILY FOUNDATION INC

EIN: 31-1698286

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
COMPUTER EQUIPMENT	13,901	13,261	640	640
OFFICE EQUIPMENT	2,536	2,536	0	

TY 2015 Legal Fees Schedule

Name: THE BEVERIDGE FAMILY FOUNDATION INC

EIN: 31-1698286

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	14,730	7,365		7,440

TY 2015 Other Assets Schedule

Name: THE BEVERIDGE FAMILY FOUNDATION INC

EIN: 31-1698286

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
ACCRUED INCOME/DIVIDEND RECEIVABLE	77,330	77,938	77,938
PREPAID FEDERAL EXCISE TAX	28,500	19,500	19,500

TY 2015 Other Decreases Schedule

Name: THE BEVERIDGE FAMILY FOUNDATION INC

EIN: 31-1698286

Description	Amount
UNREALIZED NET LOSS ON INVESTMENTS	4,310,221

TY 2015 Other Expenses Schedule**Name:** THE BEVERIDGE FAMILY FOUNDATION INC**EIN:** 31-1698286

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OFFICE EXPENSE	6,760	1,406		5,124
POSTAGE AND FREIGHT	327	68		259
WEBSITE EXPENSE	3,010	0		3,010
TELEPHONE	6,526	1,357		5,517
MEMBERSHIPS, DUES, & SUBSCRIPTIONS	3,929	817		3,112
INSURANCE	6,528	1,358		5,170
PAYROLL PROCESSING FEES	1,567	0		1,567
SOFTWARE EXPENSE	642	134		508

TY 2015 Other Increases Schedule

Name: THE BEVERIDGE FAMILY FOUNDATION INC

EIN: 31-1698286

Description	Amount
DEFERRED EXCISE TAX ADJUSTMENT	43,250

TY 2015 Other Liabilities Schedule

Name: THE BEVERIDGE FAMILY FOUNDATION INC

EIN: 31-1698286

Description	Beginning of Year - Book Value	End of Year - Book Value
DEFERRED FEDERAL EXCISE TAX	47,250	4,000

TY 2015 Other Professional Fees Schedule

Name: THE BEVERIDGE FAMILY FOUNDATION INC

EIN: 31-1698286

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OTHER PROFESSIONAL FEES	7,894	572		8,222
INVESTMENT MANAGEMENT FEES	372,790	372,790		0

TY 2015 Taxes Schedule**Name:** THE BEVERIDGE FAMILY FOUNDATION INC**EIN:** 31-1698286

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX ON INVESTMENTS	36,966	36,966		0
FEDERAL EXCISE TAXES	34,000	0		0