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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](http://www.irs.gov/form990pf).

OMB No 1545-0052

2015

Open to Public Inspection

For calendar year 2015, or tax year beginning 05-01-2015, and ending 04-30-2016

Name of foundation GARDINER HOWLAND SHAW FOUNDATION		A Employer identification number  04-6111826	
Number and street (or P O box number if mail is not delivered to street address) C/O WELCH FORBES LLC 45 SCHOOL ST		B Telephone number (see instructions)  (617) 523-1635	
City or town, state or province, country, and ZIP or foreign postal code BOSTON, MA 02108		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change <input type="checkbox"/>		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 19,422,612		J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> 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 <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B . . . . .				
	3 Interest on savings and temporary cash investments	41,380	41,380		
	4 Dividends and interest from securities . . . . .	429,481	429,481		
	5a Gross rents . . . . .				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	595,022			
	b Gross sales price for all assets on line 6a 3,128,814				
	7 Capital gain net income (from Part IV, line 2) . . .		595,022		
	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 <b>Total.</b> Add lines 1 through 11 . . . . .	1,065,883	1,065,883		
	13 Compensation of officers, directors, trustees, etc	168,855	0		168,855
	14 Other employee salaries and wages . . . . .				
	15 Pension plans, employee benefits . . . . .	42,422	0		42,619
	16a Legal fees (attach schedule). . . . .				
	b Accounting fees (attach schedule). . . . .	13,139	13,139		0
	c Other professional fees (attach schedule) . . . . .	98,432	98,432		0
	17 Interest . . . . .				
	18 Taxes (attach schedule) (see instructions) . . .	39,675	1,675		0
	19 Depreciation (attach schedule) and depletion . .				
	20 Occupancy . . . . .	2,600	0		2,600
	21 Travel, conferences, and meetings. . . . .	8,235	0		8,236
	22 Printing and publications . . . . .	1,304	0		1,304
	23 Other expenses (attach schedule). . . . .	6,922	125		6,797
	24 <b>Total operating and administrative expenses.</b>				
	Add lines 13 through 23 . . . . .	381,584	113,371		230,411
	25 Contributions, gifts, grants paid . . . . .	696,070			696,070
	26 <b>Total expenses and disbursements.</b> Add lines 24 and 25	1,077,654	113,371		926,481
	27 Subtract line 26 from line 12				
	a <b>Excess of revenue over expenses and disbursements</b>	-11,771			
	b <b>Net investment income</b> (if negative, enter -0-)		952,512		
	c <b>Adjusted net income</b> (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 . . . . .		23,161	26,278	26,278
	2	Savings and temporary cash investments . . . . .		328,972	745,847	745,847
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____				
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____				
	5	Grants receivable . . . . .				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions). . . . .				
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____				
	8	Inventories for sale or use . . . . .				
	9	Prepaid expenses and deferred charges . . . . .				
	10a	Investments—U S and state government obligations (attach schedule)				
	b	Investments—corporate stock (attach schedule) . . . . .	7,303,995	7,248,770	14,841,300	
	c	Investments—corporate bonds (attach schedule) . . . . .	2,012,834	1,806,029	1,819,742	
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____				
	12	Investments—mortgage loans. . . . .				
	13	Investments—other (attach schedule) . . . . .	2,195,256	2,025,523	1,989,445	
	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)		11,864,218	11,852,447	19,422,612	
Liabilities	17	Accounts payable and accrued expenses . . . . .				
	18	Grants payable . . . . .				
	19	Deferred revenue . . . . .				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule). . . . .				
	22	Other liabilities (describe ▶ _____)				
	23	Total liabilities(add lines 17 through 22) . . . . .	0	0		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> 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 ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds . . . . .	11,864,218	11,852,447		
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0		
	29	Retained earnings, accumulated income, endowment, or other funds	0	0		
	30	Total net assets or fund balances(see instructions) . . . . .	11,864,218	11,852,447		
31	Total liabilities and net assets/fund balances(see instructions) . . . . .	11,864,218	11,852,447			

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	11,864,218
2	Enter amount from Part I, line 27a . . . . .	2	-11,771
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3 . . . . .	4	11,852,447
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	6	11,852,447

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)	<div><div>If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7</div></div>	2	595,022
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) <div>If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 . . . . .</div>		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	976,247	19,676,750	0 049614
2013	953,050	18,705,539	0 050950
2012	851,025	17,302,600	0 049185
2011	833,458	17,010,354	0 048997
2010	795,369	16,597,484	0 047921

2	Total of line 1, column (d). . . . .	2	0 246667
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 049333
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5. . . . .	4	18,834,490
5	Multiply line 4 by line 3. . . . .	5	929,162
6	Enter 1% of net investment income (1% of Part I, line 27b). . . . .	6	9,525
7	Add lines 5 and 6. . . . .	7	938,687
8	Enter qualifying distributions from Part XII, line 4. . . . .	8	926,481

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-)

2

0

3

Add lines 1 and 2. . . . .

3

19,050

4

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

4

0

5

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

5

19,050

6

Credits/Payments

a

2015 estimated tax payments and 2014 overpayment credited to 2015

6a

25,505

b

Exempt foreign organizations—tax withheld at source. . . . .

6b

c

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

6c

d

Backup withholding erroneously withheld. . . . .

6d

7

Total credits and payments. Add lines 6a through 6d. . . . .

7

25,505

8

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

8

9

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

9

10

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

10

6,455

11

Enter the amount of line 10 to be **Credited to 2015 estimated tax** ☐ 6,455 **Refunded** ☐

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? . . . . .

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 ☐ \$ \_\_\_\_\_ 0 (2) On foundation managers ☐ \$ \_\_\_\_\_ 0

e

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

2

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

2

No

3

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

3

No

4a

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

4a

No

b

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

4b

5

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

5

No

6

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

6

Yes

7

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

7

Yes

8a

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

b

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

8b

Yes

9

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

9

No

10

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

10

No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <b>WWW SHAWFOUNDATION ORG</b>	13	Yes	
14	The books are in care of <b>WELCH FORBES LLC</b> Telephone no <b>(617) 523-1635</b> Located at <b>45 SCHOOL STREET BOSTON MA</b> ZIP+4 <b>02108</b>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year <input type="checkbox"/>	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 <input type="checkbox"/>	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? ( <b>Exception.</b> Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days ). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did <b>any</b> of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/>	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? <input type="checkbox"/>	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years <b>20</b> , <b>20</b> , <b>20</b> , <b>20</b>			
b	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to <b>all</b> years listed, answer "No" and attach statement—see instructions ). <input type="checkbox"/>	2b		
c	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here <b>20</b> , <b>20</b> , <b>20</b> , <b>20</b>			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2015 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? ( <i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015.</i> ) <input type="checkbox"/>	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?	4b		No

Part VII-B

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

5a

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

b

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

☐ Yes ☒ No

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

c

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

☐ Yes ☒ No

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

6a

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

☐ Yes ☒ No

b

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

☐ Yes ☒ No

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

7a

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

☐ Yes ☒ No

b

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

5b

6b

7b

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
THOMAS E COURY 59 GILBERT ROAD NEEDHAM, MA 02192	EXECUTIVE DIRECTOR 40 00	168,855	30,333	0
BENJAMIN J WILLIAMS JR 45 SCHOOL STREET BOSTON, MA 02108	TRUSTEE 1 00	0	0	0
THEODORE E OBER 45 SCHOOL STREET BOSTON, MA 02108	TRUSTEE 0 50	0	0	0
PETER P BROWN 45 SCHOOL STREET BOSTON, MA 02108	TRUSTEE 0 50	0	0	0

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

(a) Name and address of each employee paid more than \$50,000	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

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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
WELCH & FORBES LLC	INVESTMENT MANAGEMENT	98,432
45 SCHOOL STREET BOSTON,MA 02108		
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 TECHNICAL ASSISTANCE TO GRANTEES 27 ORGANIZATIONS ASSISTED TOTAL HOURS = 161	19,606
2 TECHNICAL ASSISTANCE TO OTHER ORGANIZATIONS 15 ORGANIZATIONS ASSISTED TOTAL HOURS = 88	10,716
3 COMMONWEALTH OF MA OFFICE OF PUBLIC COLLABORATIONMEDIATION ADVISORY COMMITTEE TOTAL HOURS = 21US ATTORNEY'S PSN REVIEW COMMITTEE TOTAL HOURS = 32PUBLICATIONS, RESEARCH, PRESENTATIONS TOTAL HOURS = 37	10,958
4 VOLUNTEER WORK FY 2016 MOTHER'S DAY PEACE MARCH TOTAL HOURS = 8PGLA EVENT TOTAL HOURS = 6OTHER TOTAL HOURS = 11	3,044

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.)

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
<b>a</b>	Average monthly fair market value of securities. . . . .	<b>1a</b>	19,096,721
<b>b</b>	Average of monthly cash balances. . . . .	<b>1b</b>	24,589
<b>c</b>	Fair market value of all other assets (see instructions). . . . .	<b>1c</b>	0
<b>d</b>	<b>Total</b> (add lines 1a, b, and c). . . . .	<b>1d</b>	19,121,310
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	<b>1e</b>	0
<b>2</b>	Acquisition indebtedness applicable to line 1 assets. . . . .	<b>2</b>	0
<b>3</b>	Subtract line 2 from line 1d. . . . .	<b>3</b>	19,121,310
<b>4</b>	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	<b>4</b>	286,820
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 Enter here and on Part V, line 4	<b>5</b>	18,834,490
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5. . . . .	<b>6</b>	941,725

**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.)

<b>1</b>	Minimum investment return from Part X, line 6. . . . .	<b>1</b>	941,725
<b>2a</b>	Tax on investment income for 2015 from Part VI, line 5. . . . .	<b>2a</b>	19,050
<b>b</b>	Income tax for 2015 (This does not include the tax from Part VI ). . . . .	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b. . . . .	<b>2c</b>	19,050
<b>3</b>	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	<b>3</b>	922,675
<b>4</b>	Recoveries of amounts treated as qualifying distributions. . . . .	<b>4</b>	0
<b>5</b>	Add lines 3 and 4. . . . .	<b>5</b>	922,675
<b>6</b>	Deduction from distributable amount (see instructions). . . . .	<b>6</b>	0
<b>7</b>	<b>Distributable amount</b> as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . . .	<b>7</b>	922,675

**Part XII**

**Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
<b>a</b>	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26. . . . .	<b>1a</b>	926,481
<b>b</b>	Program-related investments—total from Part IX-B. . . . .	<b>1b</b>	0
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes. . . . .	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required). . . . .	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule). . . . .	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	926,481
<b>5</b>	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). . . . .	<b>5</b>	0
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4. . . . .	<b>6</b>	926,481
<b>Note:</b> 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				922,675
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.				7,577
e From 2014.				16,920
f Total of lines 3a through e.	24,497			
4 Qualifying distributions for 2015 from Part XII, line 4				
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.				922,675
e Remaining amount distributed out of corpus	3,806			
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	28,303			
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.	28,303			
10 Analysis of line 9				
a Excess from 2011.				
b Excess from 2012.				
c Excess from 2013.				7,577
d Excess from 2014.				16,920
e Excess from 2015.				3,806

## Part XIV

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

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

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

THOMAS E CORY GARDINER HOWLAND SHA  
355 BOYLSTON STREET  
BOSTON, MA 02116  
(617) 247-3500

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

WRITTEN PROPOSAL

**c** Any submission deadlines  
NONE

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

ORGANIZATIONS MUST DEAL WITH THE PREVENTION OF CRIME AND THE REHABILITATION OF CRIMINALS

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	696,070
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		
<b>1</b> Program service revenue						
<b>a</b> _____						
<b>b</b> _____						
<b>c</b> _____						
<b>d</b> _____						
<b>e</b> _____						
<b>f</b> _____						
<b>g</b> Fees and contracts from government agencies						
<b>2</b> Membership dues and assessments. . . . .						
<b>3</b> Interest on savings and temporary cash investments . . . . .			14	41,380		
<b>4</b> Dividends and interest from securities. . . . .			14	429,481		
<b>5</b> Net rental income or (loss) from real estate						
<b>a</b> Debt-financed property. . . . .						
<b>b</b> Not debt-financed property. . . . .						
<b>6</b> Net rental income or (loss) from personal property . . . . .						
<b>7</b> Other investment income. . . . .						
<b>8</b> Gain or (loss) from sales of assets other than inventory . . . . .			18	595,022		
<b>9</b> Net income or (loss) from special events						
<b>10</b> Gross profit or (loss) from sales of inventory . . . . .						
<b>11</b> Other revenue <b>a</b> _____						
<b>b</b> _____						
<b>c</b> _____						
<b>d</b> _____						
<b>e</b> _____						
<b>12</b> Subtotal Add columns (b), (d), and (e). . . . .		0		1,065,883		0
<b>13 Total.</b> Add line 12, columns (b), (d), and (e). . . . .			<b>13</b>		1,065,883	

(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 )
2767 SHS GOOGLE INC CL	P	2015-02-20	2015-05-04
2500 SHS APACHE CORP	P	2005-02-01	2015-06-10
2000 SHS CARMAX INC	P	2003-04-11	2015-06-10
1000 SHS DANAHER CORP	P	2007-05-21	2015-06-10
1000 SHS HOME DEPOT INC	P	2009-02-25	2015-06-10
4000 SHS HOSPITALITY PROP TRUST	P	2008-04-22	2015-06-10
578 717 SHS IRON MTN INC COM	P	2014-11-04	2015-06-10
7999 283 SHS IRON MTN INC COM	P	2005-03-04	2015-06-10
600 SHS ISHARES IBOXX INST GRADE CRP BND	P	2012-10-04	2015-06-10
600 SHS ISHARES 1-3 YEAR CR BND	P	2012-10-04	2015-06-10

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)
145		149	-4
146,722		139,123	7,599
145,985		17,616	128,369
85,878		35,680	50,198
110,348		20,290	90,058
117,292		133,870	-16,578
18,323		20,436	-2,113
253,272		175,796	77,476
69,009		70,760	-1,751
62,991		63,285	-294

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	
			-4
			7,599
			128,369
			50,198
			90,058
			-16,578
			-2,113
			77,476
			-1,751
			-294

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 )
4000 SHS LIFE TIME FITNESS INC	P	2013-01-15	2015-06-10
6000 SHS TERADATA CORP	P	2010-06-14	2015-06-10
6000 SHS TORONTO DOMINION BANK ONTARIO	P	2014-05-15	2015-06-10
900 SHS VANGUARD INTERMEDIATE-TERM BND	P	2012-10-04	2015-06-10
1800 SHS VISA INC CLASS A SHARES	P	2010-06-14	2015-06-10
200000 UNITS JPMORGAN CHASE SR M TERM NT	P	2011-04-06	2015-06-24
99 SHS RMR GROUP INC	P	2015-12-15	2015-12-28
10000 SHS SUNCOR ENERGY INC	P	2015-02-20	2015-12-29
6000 SHS RMR GROUP INC	P	2015-12-15	2016-01-05
200000 UNITS GOLDMAN SACHS INC NOTE	P	2011-02-15	2016-02-07

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)
288,130		205,584	82,546
235,553		199,328	36,225
267,955		285,959	-18,004
74,870		78,266	-3,396
124,921		33,780	91,141
200,000		200,000	0
1,390		1,232	158
263,281		302,826	-39,545
8		7	1
200,000		198,874	1,126

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	
			82,546
			36,225
			-18,004
			-3,396
			91,141
			0
			158
			-39,545
			1
			1,126



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	Date acquired (c) (mo , day, yr )	(d) Date sold (mo , day, yr )
1000 SHS AFLAC INC	P	2003-01-31	2016-02-29
1000 SHS HOME DEPOT INC	P	2009-02-25	2016-02-29
1000 SHS MICROSOFT CORP	P	2002-10-23	2016-02-29
5000 SHS VANGUARD EMERGING MKTS STK IDX	P	2011-04-26	2016-02-29
1000 SHS VISA INC CLASS A SHS	P	2010-06-14	2016-02-29
CAPITAL GAINS 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)
59,806		32,490	27,316
124,719		20,290	104,429
50,839		26,085	24,754
153,891		253,299	-99,408
72,841		18,767	54,074
645			645


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	
			27,316
			104,429
			24,754
			-99,408
			54,074
			645

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
ADOLESCENT CONSULTATION SERVICES INC 189 CAMBRIDGE STREET CAMBRIDGE,MA 02141	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE JUVENILE COURT CLINIC ADVOCACY PROJECT	5,000
ARISE FOR SOCIAL JUSTICE 467 MAIN STREET SPRINGFIELD,MA 01105	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S CRIMINAL JUSTICE REFORM ADVOCACY WORK	5,000
ASSOCIATED GRANTMAKERS 133 FEDERAL STREET BOSTON,MA 02110	N/A	OTHER PUBLIC CHARITY	FY 2016 SUPPORT	4,300
BRIDGE TO HOPE INC 320 MAIN STREET HYANNIS,MA 02601	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S MENTORING PROGRAM FOR FEMALE OFFENDERS	10,000
CAREER COLLABORATIVE 77 SUMMER STREET BOSTON,MA 02111	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S EMPLOYMENT ASSISTANCE PROGRAM SERVING EX-OFFENDERS	2,500
CITIZENS FOR JUVENILE JUSTICE 44 SCHOOL STREET BOSTON,MA 02108	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT FOR THE AGENCY'S JUVENILE JUSTICE REFORM ACTIVITIES	32,500
CITIZENS FOR SAFETY 31 HEATH STREET SUITE 12 JAMAICA PLAIN,MA 02130	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE "LIPSTICK" GUN VIOLENCE PREVENTION PROJECT	10,000
COMMUNITY DISPUTE SETTLEMENT CENTER 60 GORE STREET CAMBRIDGE,MA 02141	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S COURT MEDIATION PROGRAM	2,500
COMMUNITY RESOURCES FOR JUSTICE 355 BOYLSTON STREET BOSTON,MA 02116	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT FOR THE AGENCY'S CRIMINAL JUSTICE REFORM WORK AND SUPPORT FOR THE "COMING HOME" EX-OFFENDER RESOURCE DIRECTORY	91,000
COMMUNITY SERVINGS INC 18 MARBURY TERRACE JAMAICA PLAIN,MA 02130	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S CULINARY ARTS VOCATIONAL TRAINING PROGRAM SERVING PAROLEES	13,000
COUNCIL ON FOUNDATIONS 2121 CRYSTAL DRIVE SUITE 700 ARLINGTON,VA 22202	N/A	OTHER PUBLIC CHARITY	FY 2016 SUPPORT	4,600
CRIMINAL JUSTICE POLICY COALITION 549 COLUMBUS AVENUE BOSTON,MA 02118	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S CRIMINAL JUSTICE REFORM WORK	10,000
DISMAS HOUSE OF MA INC 30 RICHARDS STREET WORCESTER,MA 01603	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S RE-ENTRY SERVICES FOR EX-OFFENDERS	20,000
DOC WAYNE YOUTH SERVICES 418 COMMONWEALTH AVENUE BOSTON,MA 02215	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S SPORTS BASED CLINICAL PROGRAMS SERVING YOUTHFUL OFFENDERS AND HIGH-RISK YOUTH	25,000
EPOCA INC 4 KING STREET WORCESTER,MA 01610	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S CRIMINAL JUSTICE REFORM WORK	15,000
<b>Total . . . . .</b>			<b>3a</b>	696,070

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
ESSEX COUNTY COMMUNITY FOUNDATION 175 ANDOVER STREET DANVERS,MA 01923	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE 2015 ESSEX COUNTY YAR CONFERENCE	2,500
FREEDOM MINISTRIES INC PO BOX 51521 BOSTON,MA 02205	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S PRISON VISITATION ASSISTANCE PROGRAM	7,000
FRIENDS OF BOSTON'S HOMELESS 12 WISE STREET BOSTON,MA 02205	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S EX-OFFENDER RESIDENTIAL SUPPORT AND VOCATIONAL TRAINING PROGRAM	6,000
FRIENDS OF PRISONERS INC 84 BEARSES WAY HYANNIS,MA 02601	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S RESIDENTIAL RE-ENTRY PROGRAM FOR EX-OFFENDERS	8,000
GREATER BOSTON LEGAL SERVICES 197 FRIEND STREET BOSTON,MA 02114	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE CRIMINAL OFFENDER RECORDS INFORMATION REFORM PROJECT	30,000
HEALTH LAW ADVOCATES 1 FEDERAL STREET BOSTON,MA 02110	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE JUVENILE COURT MENTAL HEALTH ADVOCACY PROJECT	12,500
INNERCITY WEIGHTLIFTING PO BOX 171313 BOSTON,MA 02117	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S GANG INTERVENTION AND CAREER DEVELOPMENT PROGRAMS SERVING HIGH RISK YOUTH	20,000
JUVENILE LAW CENTER 1350 WALNUT STREET PHILADELPHIA,PA 19107	N/A	OTHER PUBLIC CHARITY	GENERAL SUPPORT FOR THE AGENCY'S LEGAL ADVOCACY WORK	5,000
MA ADVOCATES FOR CHILDREN 25 KINGSTON STREET 2F BOSTON,MA 02111	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S TRAUMA AND LEARNING PROJECT	6,500
MA COMMUNITIES ACTION NETWORK 1773 DORCHESTER AVENUE BOSTON,MA 02124	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S CRIMINAL JUSTICE REFORM COMMUNITY ORGANIZING ACTIVITIES	10,000
MA COUNCIL OF HUMAN SERVICE PROVIDERS INC 88 BROAD STREET BOSTON,MA 02110	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE 2015 HUMAN SERVICE PROVIDERS CONFERENCE	3,000
MASSACHUSETTS BAIL FUND 549 COLUMBUS AVENUE BOSTON,MA 02118	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S BAIL FUND AND BAIL REFORM PROJECT	5,000
MASSACHUSETTS INSTITUTE FOR A NEW COMMONWEALTH 11 BEACON STREET SUITE 500 BOSTON,MA 02108	N/A	OTHER PUBLIC CHARITY	CONTINUED SUPPORT FOR THE MA CRIMINAL JUSTICE REFORM CAMPAIGN	35,000
MORE THAN WORDS INC 376 MOODY STREET WALTHAM,MA 02453	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S WORK AND EDUCATIONAL ASSISTANCE PROGRAMS SERVING YOUTHFUL OFFENDERS	12,000
MOTHERS FOR EQUALITY AND JUSTICE 184 DUDLEY STREET ROXBURY,MA 02119	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S PEER LEADERSHIP AND ANTI-VIOLENCE PROGRAMS	10,000
<b>Total . . . . .</b>  <b>3a</b>				696,070

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
N E ASSOCIATION OF DRUG COURT PROFESSIONALS 465 CONGRESS STREET PORTLAND,ME 04101	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE ANNUAL NEW ENGLAND DRUG COURT PROFESSIONAL CONFERENCE	2,500
NATIONAL MENTORING PARTNERSHIP 201 SOUTH STREET BOSTON,MA 02111	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE 2015 NATIONAL MENTORING PARTNERSHIP CONFERENCE	7,500
NEADS INC PO BOX 1100 PRINCETON,MA 01541	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE ORGANIZATION'S PRISON PUP TRAINING PROGRAM	10,000
OAK HILL COMMUNITY DEVEOPMENT CORP 74 PROVIDENCE STREET WORCESTER,MA 01604	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE GREATER WORCESTER COUNTY "COMING HOME" EX-OFFENDER RESOURCE DIRECTORY	10,000
OLD COLONY YMCA 320 MAIN STREET BROCKTON,MA 02301	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE SOAR EX-OFFENDER RE-ENTRY PROJECT	14,000
ON THE RISE INC 341 BROADWAY CAMBRIDGE,MA 02139	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S LEGAL ADVOCACY SERVICES ASSISTING JUSTICE SYSTEM INVOLVED WOMEN	1,000
PAIR PROJECT 98 N WASHINGTON ST 106 BOSTON,MA 02114	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S LEGAL ADVOCACY WORK ASSISTING ASYLUM SEEKERS HELD IN DETENTION CENTERS	9,000
PLYMOUTH COUNTY SHERIFF'S DEPARTMENT 24 LONG POND ROAD PLYMOUTH,MA 02360	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE DEPARTMENT'S MUSICAL ARTS PROJECT	10,000
PRISON BOOK PROGRAM 1306 HANCOCK STREET QUINCY,MA 02169	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S BOOK COLLECTION AND DISTRIBUTION PROGRAM SERVING PRISONS AND JAILS IN MASSACHUSETTS	5,000
PRISON POLICY INITIATIVE PO BOX 127 NORTHAMPTON,MA 01061	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S CRIMINAL JUSTICE REFORM RESEARCH AND PUBLICATIONS	5,000
PRISONERS LEGAL SERVICES 10 WINTHROP SQUARE BOSTON,MA 02110	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S LEGAL ADVOCACY SERVICES FOR INCARCERATED INMATES	22,500
ROBERT F KENNEDY CHILDREN'S ACTION CORPS 11 BEACON STREET SUITE 1120 BOSTON,MA 02108	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S JUVENILE DETENTION DIVERSION PROGRAM	18,000
ROCA INC 101 PARK STREET CHELSEA,MA 02150	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S SERVICES FOR HIGH RISK AND GANG-INVOLVED YOUTH	5,000
RODMAN RIDE FOR KIDS 10 LINCOLN ROAD 208 FOXBORO,MA 02035	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR 2015 CELEBRATION FOR KIDS FUNDRAISING EVENT	3,600
ROOM TO GROW INC 142 BERKELEY STREET BOSTON,MA 02116	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S PARENTAL ASSISTANCE PROGRAM SERVING FEMALE OFFENDERS	10,000
<b>Total . . . . .</b>			<b>3a</b>	696,070

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
SELF ESTEEM BOSTON PO BOX 301115 JAMAICA PLAIN,MA 02130	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S COUNSELING PROGRAM SERVING FEMALE EX-OFFENDERS	10,000
SPAN INC 105 CHAUNCY STREET BOSTON,MA 02111	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S PRISONER COMMUNITY RE-ENTRY PROGRAM	15,000
STRAIGHT AHEAD MINISTRIES INC 791 MAIN STREET WORCESTER,MA 01610	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S AFTERCARE PROGRAM SERVING YOUTH RELEASED FROM THE DYS	14,000
STRATEGIES FOR YOUTH INC PO BOX 390174 CAMBRIDGE,MA 02139	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S POLICE/YOUTH INTERACTION TRAINING PROGRAMS	10,000
THE BOSTON FOUNDATION 75 ARLINGTON STREET 1000 BOSTON,MA 02116	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE BOSTON FOUNDATION CIVIC FUND	6,000
THE KEY PROGRAM 670 OLD CONNECTICUT PATH FRAMINGHAM,MA 01701	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S RESIDENTIAL PROGRAMS SERVING DYS YOUTH	5,000
THE PERFORMANCE PROJECT PO BOX 5195 SPRINGFIELD,MA 01101	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S ARTS PROGRAMS SERVING JUSTICE SYSTEM INVOLVED YOUTH	10,000
TRINITY BOSTON FOUNDATION 206 CLARENDON STREET BOSTON,MA 02116	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE 2016 BOSTONIANS FOR YOUTH PROGRAM	3,000
UTEC INC 35 WARREN STREET LOWELL,MA 01852	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S GANG INTERVENTION AND STREET WORKER PROGRAM	14,000
WAYSIDE YOUTH AND FAMILY SUPPORT NETWORK 1 FREDERICK ABBOTT WAY FRAMINGHAM,MA 01701	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S FAMILY SUPPORT SERVICES FOR HIGH-RISK YOUTH	5,000
WELLESLEY CENTERS FOR WOMEN 106 CENTRAL STREET WELLESLEY,MA 02481	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE WOMEN'S JUSTICE NETWORK	15,000
YOUTH ADVOCACY FOUNDATION 44 BROMFIELD STREET 2ND FL BOSTON,MA 02108	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE EDUCATION LAW PROJECT	5,070
YOUTH BUILD BOSTON 27 CENTRE STREET ROXBURY,MA 02119	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S VOCATIONAL TRAINING PROGRAMS SERVING YOUTHFUL OFFENDERS	15,000
YW BOSTON 140 CLARENDON STREET BOSTON,MA 02116	N/A	OTHER PUBLIC CHARITY	SUPPORT FOR THE AGENCY'S YOUTH/POLICE DIALOGUES PROGRAM	13,000
<b>Total . . . . .</b>				696,070

## TY 2015 Accounting Fees Schedule

**Name:** GARDINER HOWLAND SHAW FOUNDATION

**EIN:** 04-6111826

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
RUSSELL BRIER & CO , LLP	10,639	10,639		0
WELCH & FORBES TAX PREP FEE	2,500	2,500		0

**TY 2015 Investments Corporate Bonds Schedule****Name:** GARDINER HOWLAND SHAW FOUNDATION**EIN:** 04-6111826

<b>Name of Bond</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
200,000 AFLAC INC SENIOR NOTE DTD 02/10/12, 2.65%	200,997	202,698
200,000 CINTAS CORP TERM NOTE DTD 05/23/11, 2.85%	200,391	200,314
200,000 GOLDMAN SACHS GROUP INC NOTE DTD 02/07/11, 3.625%	0	0
200,000 JPMORGAN CHASE TERM NOTE DTD 06/24/10, 3.4%	0	0
200,000 MEDCO HEALTH SOLUTIONS INC NOTE DTD 09/10/10, 4.125%	203,064	211,812
200,000 MURPHY OIL CORP SR NOTE DTD 11/30/12, 2.5%	201,033	197,164
200,000 CVS CAREMARK CORP NOTE DTD 12/05/2013 2.25%	200,804	204,580
200,000 KENNAMETAL INC SR NT DTD 11/07/2012 2.65%	200,823	190,316
200,000 EBAY INC SR GLBL NT DTD 07/28/14, 2.875%	198,088	203,708
200,000 WALGREEN CO SR NT DTD 09/13/12, 3.1%	202,575	204,056
200,000 FISERV INC SR GLBL NT	198,254	205,094

TY 2015 Investments Corporate Stock Schedule

**Name:** GARDINER HOWLAND SHAW FOUNDATION  
**EIN:** 04-6111826

Name of Stock	End of Year Book Value	End of Year Fair Market Value
4,000 AFLAC INC	129,960	275,880
2,500 APACHE CORP	0	0
5,400 AUTOMATIC DATA PROCESSING INC	186,030	477,576
2,700 BECTON DICKINSON & CO	190,713	435,402
8,000 CARMAX INC	70,465	423,600
3,000 CHEVERON CORP	62,649	306,540
6,000 DANAHER CORP	214,080	580,500
3,000 EXXON MOBILE CORP	5,441	265,200
5,000 HOME DEPOT INC	101,450	669,450
6,000 HOSPITALITY PROPERTIES TRUST	200,184	153,540
2,000 IBM CORP	257,008	291,880
8,578 IRON MOUNTAIN INC	0	0
6,000 JOHNSON & JOHNSON	324,360	672,480
4,000 LIFE TIME FITNESS INC	0	0
3,800 MCDONALDS CORP	264,980	480,662
7,000 MERCK & CO INC	300,853	383,880
8,000 MICROSOFT CORP	208,680	398,960
7,000 PEPSICO INC	312,873	720,720
4,000 PRAXAIR INC	250,850	469,840
7,000 PROCTER & GAMBLE CO	11,884	560,840
7,200 QUALCOMM INC	268,765	363,744
5,000 SCHLUMBERGER LTD	155,521	401,700
4,000 STERICYCLE INC	94,547	382,240
5,000 STRYKER CORP	232,544	545,050
6,000 TERADATA CORP	0	0
3,000 3M CO	19,959	502,140
5,000 UNITED TECHNOLOGIES CORP	102,419	521,850
10,000 VERIZON COMMUNICATIONS INC	263,409	509,400
6,000 VISA INC CLASS A SHARES	112,601	463,440
12,000 WELLS FARGO & CO	301,432	599,760



Name of Stock	End of Year Book Value	End of Year Fair Market Value
5,400 CHECK POINT SOFTWARE TECHNOLOGIES LTD	274,474	447,498
2,000 CVS HEALTH CORP	164,480	201,000
3,600 CHURCH & DWIGHT CO	243,136	333,720
465 GOOGLE INC	0	0
600 METTLER TOLEDO INTERNATIONAL INC	160,367	214,770
6,500 SUNCOR ENERGY INC	0	0
6,000 TORONTO DOMINION BANK	0	0
466 ALPHABET INC CAP STK	251,144	322,943
3,000 CAPITAL ONE FINANCIAL CORP	260,795	217,170
3,000 FISERV INC	241,829	293,160
4,000 JPMORGAN CHASE & CO	273,720	252,800
210 PRICELINE GRP INC	248,824	282,169
850 ALLERGAN PLC	253,623	184,076
2,000 CHUBB LIMITED	232,719	235,720
ROUNDING ADJUSTMENT	2	0

**TY 2015 Investments - Other Schedule****Name:** GARDINER HOWLAND SHAW FOUNDATION**EIN:** 04-6111826

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
15,000 FIRST TRUST NORTH AMERN ENERGY INFRAS FD ETF	AT COST	325,650	343,500
1,900 ISHARES IBOXX INVESTMENT GRADE CORPORATE BOND ETF	AT COST	187,282	228,627
2,400 ISHARES 1-3 YEAR CREDIT BOND ETF	AT COST	249,530	253,488
19,000 KAYNE ANDERSON MLP INVESTMENT CO	AT COST	455,846	344,280
12,000 MORGAN STANLEY CAPITAL TRUST III CAPITAL SECURITIES 6.25%	AT COST	300,583	309,000
2,500 VANGUARD INTERMEDIATE TERM BOND ETF	AT COST	189,119	215,850
5,000 VANGUARD EMERGING MARKETS STOCK	AT COST	0	0
14,000 MANNING & NAPIER	AT COST	317,513	294,700

**TY 2015 Other Expenses Schedule****Name:** GARDINER HOWLAND SHAW FOUNDATION**EIN:** 04-6111826

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
IT COSTS	1,402	0		1,402
POSTAGE	232	0		232
SUPPLIES	823	0		823
TELEPHONE & TELECOMMUNICATIONS	4,340	0		4,340
MA FILING FEES	125	125		0

# TY 2015 Other Professional Fees Schedule

**Name:** GARDINER HOWLAND SHAW FOUNDATION

**EIN:** 04-6111826

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	98,432	98,432		0

**TY 2015 Taxes Schedule****Name:** GARDINER HOWLAND SHAW FOUNDATION**EIN:** 04-6111826

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX WITHHELD	1,675	1,675		0
FEDERAL INCOME TAX	38,000	0		0