OMB No 1545-0052

Open to Public

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 <u>www.irs.gov/form990pf</u>.

Inspection

For	caler	ndar year 2015, or tax year beginning 10-0	1-2015	, a	nd ending 0	9-30-2016	
	e of four	ndation DUNDATION			A Employer ide	entification numb	er
	O CHOAT				04-6746970		
		street (or P O box number if mail is not delivered to street address)	Room/suite		B Telephone num	nber (see instruction	s)
РО	BOX 961	1019			(617) 248-5000		
	or town, ΓΟΝ, ΜΑ	state or province, country, and ZIP or foreign postal code 02196			C If exemption	application is pendin	ig, check here
G C	neck all	that apply Finitial return Finitial return of a	former public charity		D 1 Foreign or	zanizatione chock h	oro 🕨
G C1	ieck an	Final return A mended return Address change Name change	ormer public enamey		2. Foreign on	ganizations, check h ganizations meeting k here and attach co	the 85%
		pe of organization Section 501(c)(3) exempt private 4947(a)(1) nonexempt charitable trust Other taxal		า	E If private fou	ndation status was in 507(b)(1)(A), chec	terminated
•			Cash		F If the founda	tion is in a 60-mont	h termination
of۱	year <i>(fr</i>	rom Part II, col (c),				507(b)(1)(B), ched	
Pa	rt I	Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))	Revenue and expenses per (a) books	(b)	Net investment income	Adjusted net (c) Income	Disbursements for chantable purposes (d) (cash basis only)
	1	Contributions, gifts, grants, etc , received (attach					
		schedule)	5,808,043				
	2	Check ► ☐ If the foundation is not required to attach Sch B					
	3	Interest on savings and temporary cash investments					
	4	Dividends and interest from securities	274,234		274,234		
	5a	Gross rents					
	b	Net rental income or (loss)					
Reverue	6a b	Net gain or (loss) from sale of assets not on line 10	445,062				
Se∨	"	Gross sales price for all assets on line 6a 5,682,294					
_	7	Capital gain net income (from Part IV, line 2)			690,953		
	8	Net short-term capital gain					
	9	Income modifications					
	10a	Gross sales less returns and allowances Less Cost of goods sold					
	b	Gross profit or (loss) (attach schedule)					
	C	Other income (attach schedule)					
	11	Total.Add lines 1 through 11	6,527,339		965,187		
	12	Compensation of officers, directors, trustees, etc	0,327,339		0		0
	14	Other employee salaries and wages	_				_
s	15	Pension plans, employee benefits					
Se	16a	Legal fees (attach schedule)					
Expenses	ь	Accounting fees (attach schedule)	9,900		4,950		4,950
Ĕ	c	Other professional fees (attach schedule)	84,749		67,017		17,732
llve	17	Interest					
tra	18	Taxes (attach schedule) (see instructions)	5,426		0		0
and Administrative	19	Depreciation (attach schedule) and depletion					
ΑĠ	20	Occupancy					
י שני	21	Travel, conferences, and meetings					
ਰ	22	Printing and publications	∞ 653		583		70
Operating	23	Other expenses (attach schedule)	653		303		1
era	24	Total operating and administrative expenses. Add lines 13 through 23	100,728		72,550		22,752
ď	25	Contributions, gifts, grants paid	471,000		, 2,330		471,000
	26		1, 1,300				171,000
		Total expenses and disbursements. Add lines 24 and 25	571,728		72,550		493,752
	27	Subtract line 26 from line 12					
	а	Excess of revenue over expenses and disbursements	5,955,611				
	ь	Net investment income (If negative, enter -0-)			892,637		
	۱ ،	Adjusted net income(if negative, enter -0-)	İ	ı			1

Рa	rt 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 o	f year
			(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash—non-interest-bearing		1	1
	2	Savings and temporary cash investments	87,730	749,571	749,571
	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 ▶			
Ś	8	Inventories for sale or use			
Assets	9	Prepaid expenses and deferred charges			
As	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	5,534,657	-	9,736,331
	С	Investments—corporate bonds (attach schedule)	283,266	714,977	740,233
	11	Investments—land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	2,711,126	4,871,605	4,968,105
	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)	8,616,779	14,572,390	16,194,241
	17	Accounts payable and accrued expenses			
	18	Grants payable			
6S	19	Deferred revenue			
abilities	20	Loans from officers, directors, trustees, and other disqualified persons			
lab	21	Mortgages and other notes payable (attach schedule)			
_	22	Other liabilities (describe			
	23	Total liabilities(add lines 17 through 22)	0	0	
		Foundations that follow SFAS 117, check here ▶			
ses.		and complete lines 24 through 26 and lines 30 and 31.			
æ	24	Unrestricted			
Balance	25	Temporarily restricted			
	26	Permanently restricted			
Fund		Foundations that do not follow SFAS 117, check here			
5		and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	10,556,583	10,556,583	
Assets	28	Paid-in or capital surplus, or land, bldg, and equipment fund	-2,210,348	-2,210,348	
As	29	Retained earnings, accumulated income, endowment, or other funds	270,544	6,226,155	
Net	30	Total net assets or fund balances(see instructions)	8,616,779	14,572,390	
_	31	Total liabilities and net assets/fund balances(see instructions)	8,616,779	14,572,390	
Dε	rt 1111				
1	TT	Total net assets or fund balances at beginning of year—Part II, column ((a) line 30 (must ad	ree	
-			a), fille 30 (filust ag		8,616,779
2		Enter amount from Part I, line 27a			5,955,611
3		-		3	0
4		Add lines 1, 2, and 3		_ 	14,572,390
5		Decreases not included in line 2 (itemize)		5	14,572,590
6		Total net assets or fund balances at end of year (line 4 minus line 5)—Pa	art II column (h) lir		14.572.390

Part IV Capital Gains and Losses for Tax on Investment Income

How acquired

			(s) of property sold (e g , re or common stock, 200 shs	•	How acquire	e / (c)	Date acquired (mo , day, yr)	Date sold (d) (mo , day, yr)
1a	See Additional Data	<u>'</u>	<u> </u>	•	(b) D—Donation	1,,		
b	See Additional Data	Tubic						
c						+		
d						+		
е е						+		
			Depreciation allowe	d Cos	t or other basis	╁	Gair	or (loss)
(e) Gross sales price		(f) (or allowable)		expense of sale			(f) minus (g)
а	See Additional Data	Γable						
b								
С								
d								
е								
Со	mplete only for assets s	howing	gaın ın column (h) and owne	ed by the foundatio	n on 12/31/69		Gains (Col	(h) gaın mınus
(i)	FMV as of 12/31/69		Adjusted basis		cess of col (ı)	///		ot less than -0-) or (from col (h))
	See Additional Data	Fable	(j) as of 12/31/69	(K) 0V6	ercol (j), if any	(1)	Lusses	(IIOIII COI (II))
a b	See Additional Data	i abie				+		
						+		
c d						+		
		-				+		
е		l		If gain, also enter	un Dowt I. June 7	. —		
3	·	_	r (loss) as defined in sectione 8, column (c) (see instru		•	2 		690,953
Part '	V Qualification L	Jnder 9	Section 4940(e) for R	educed Tax o	n Net Investm			
	ional use by domestic p on 4940(d)(2) applies, l		undations subject to the se s part blank	ection 4940(a) tax	on net investmen	t inco	me)	
			n 4942 tax on the distributa v under section 4940(e) Do			period	7	┌ Yes ✓ No
1 Ent	er the appropriate amo	unt ın ea	ch column for each year, se	ee instructions bef	ore making any er	itries		
	(a) period years Calendar or tax year beginning in)	Adjus	(b) sted qualifying distributions	(c Net value of noncha) antable-use assets		(d) Distributio (col (b) divided	n ratio
	2014		524,225		10,149,147			0 051652
	2013		518,781		10,489,188			0 049459
	2012		475,622		9,647,043			0 049302
	2011		437,031		8,510,321			0 051353
	2010		402,231		7,762,770	_		0 051815
2	•	` '				2		0 253581
3			the 5-year base period—div lation has been in existence			3		0 050716
4	•		rıtable-use assets for 2015	•		4		14,748,566
5	Multiply line 4 by line	3				5		747,988
6			ncome (1% of Part I, line 2		<u> </u>	6		8,926
7	Add lines 5 and 6					7		756,914
8			from Part XII, line 4		F	8		493,752
		greater	than line 7, check the box		L		using a 1% ta	

General (or designate) of each state as required by General Instruction G? If "No," attach explanation.

If "Yes," complete Part XIV

and addresses

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)?

. Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names 8h

9

10

Yes

No

No

Par	t VII-A Statements Regarding Activities (continued)			
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the			
	meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had			
	advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
	Website address ►N/A			
14	The books are in care of ▶CHOATE HALL STEWART LLP Telephone no ▶(617) 248-	5000	
	Located at ►TWO INTERNATIONAL PLACE 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			
16	At any time during calendar year 2015, did the foundation have an interest in or a signature or other authority over		Yes	No
	a bank, securities, or other financial account in a foreign country?	16		No
	See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶			
B-				
Pal	rt VII-B Statements Regarding Activities for Which Form 4720 May Be Required		V	NI-
1-	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. During the year did the foundation (either directly or indirectly)		Yes	No
Ia	(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? Yes ✓ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	İ		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	İ		!
	(5) Transfer any income or assets to a disqualified person (or make any of either available	j		
	for the benefit or use of a disqualified person)?			
	(6) Agree to pay money or property to a government official? (Exception. Check "No"			
	ıf 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)			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations			
	section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b		No
	Organizations relying on a current notice regarding disaster assistance check here	l		
С	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?	1 c		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))			
а	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?	 		
b	If "Yes," list the years > 20, 20, 20, 20 Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2)			
b	(relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2)			
	to allyears 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			
3а	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at			
	any time during the year?			
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

	n 990-PF (2015) rt VII-B Statements Rega	rding	Activities for	Wh	nich Form 4720	May	Be Required (Con	ntinue	ed)	Page 6
5a	During the year did the foundatio (1) Carry on propaganda, or othe	n pay o	rıncur any amount	to			•			
	(2) Influence the outcome of any on, directly or indirectly, any		,		, ,			√ No		
	(3) Provide a grant to an individu						Yes		i i	
	(4) Provide a grant to an organize in section 4945(d)(4)(A)? (s						ped			
	(5) Provide for any purpose othe educational purposes, or for t		-				· · · Tyes	√ No		
b	If any answer is "Yes" to 5a(1)- Regulations section 53 4945 or		-				•		5b	
	Organizations relying on a currer	nt notice	e regarding disaste	eras	ssistance check here	e		_		
c	If the answer is "Yes" to question tax because it maintained expens							ˈ ┌ No		
_	If "Yes," attach the statement requ	-	_							
6a	Did the foundation, during the year a personal benefit contract?							✓ No		
b	Did the foundation, during the year	ar, pay	premiums, directly	orı	ndırectly, on a perso	nal l	•	• •	6b	No
7a	If "Yes" to 6b, file Form 8870 At any time during the tax year, i	was the	foundation a party	to a	a prohibited tax sheli	ter tı	ransaction? Yes	.∡ No		
	If yes, did the foundation receive				·		1 .03		7b	
	Information Abou								d Emp	loyees,
	and Contractors List all officers, directors, trustee	s. found	dation managers a	nd t	heir compensation (see i	nstructions).			
	(a) Name and address	Т	itle, and average hours per week voted to position		Compensation(If not paid, enter -0-)	e	(d) Contributions to mployee benefit plans	1		e account, Ilowances
VILLI	IAM P EGAN	TRUST	ГЕЕ		0	anu	deferred compensatio	0		0
NΤI	DATE HALL STEWART LLP TWO L PL STON, MA 02110	1 00								
HAR	RLES A CHEEVER	TRUST	ΓΕΕ		0			0		0
NΤ	DATE HALL STEWART LLP TWO L PL STON,MA 02110	1 00								
2	Compensation of five highest-paid	l emplo	yees (other than t	hos	e included on line 1-	see	instructions). If none,	enter "	NONE."	
Nai	(a) me and address of each employee more than \$50,000		Title, and avera hours per wee b) devoted to posi	k	(c) Compensatio	n	Contributions to employee benefit plans and deferre (d) compensation	_ I	•	e account, Ilowances
10 N	NE									
ot a	al number of other employees paid	over \$5	0,000				<u> </u>	+		0
								For	m 990 -	PF (2015)

Form **990-PF** (2015)

5

1

2a

3

4

5

6

1

2

5

Part XI

14,058,273

14,973,163

14,973,163

14,748,566

224,597

737,428

737,428

17,853

719,575

719.575

719,575

493,752

493,752

493,752

Form 990-PF (2015)

914,890

Minimum Investment Return

 (All o	domestic	foundations	mus

Distributable Amount

t complete this part. Foreign foundations, see instructions.) Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.

purposes

Fair market value of all other assets (see instructions). Reduction claimed for blockage or other factors reported on lines 1a and 1e

1c (attach detailed explanation).

2 3

Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see

Distributable amount before adjustments Subtract line 2c from line 1.

Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4

2a

2b

(see instructions) (Section 4942(1)(3) and (1)(5) private operating foundations and certain foreign organizations

1a

1b

1c 1d

> 2 3

> 4

5

1

2c

3

4

5

6

7

1a

1b

2

3а

3b

4

5

17,853

Tax on investment income for 2015 from Part VI, line 5.

check here ► and do not complete this part.)

Income tax for 2015 (This does not include the tax from Part VI). . .

Recoveries of amounts treated as qualifying distributions.

Deduction from distributable amount (see instructions).

Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes

A mounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc.,

Expenses, contributions, qifts, etc —total from Part I, column (d), line 26.

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for

7 Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . Part XII **Qualifying Distributions** (see instructions)

Amounts set aside for specific charitable projects that satisfy the

the section 4940(e) reduction of tax in those years

Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment

P	art XIII Undistributed Income (see instru	uctions)			
		(a)	(b)	(c)	(d)
	<u> </u>	Corpus	Years prior to 2014	2014	2015
	Distributable amount for 2015 from Part XI, line 7				719,575
	Undistributed income, if any, as of the end of 2015			475.640	
	Enter amount for 2014 only			175,612	
	Total for prior years 20 , 20 , 20 ,		0		
	Excess distributions carryover, if any, to 2015				
а					
b					
	From 2012				
	From 2014				
	Total of lines 3a through e		0		
	Qualifying distributions for 2015 from Part				
•	XII, line 4 \$ 493,752				
а	Applied to 2014, but not more than line 2a			175,612	
	Applied to undistributed income of prior years		0		
	(Election required—see instructions)				
C	Treated as distributions out of corpus (Election required—see instructions)		0		
d	Applied to 2015 distributable amount				318,140
e	Remaining amount distributed out of corpus		0		
5	Excess distributions carryover applied to 2015		0		C
	(If an amount appears in column (d), the				
6	same amount must be shown in column (a)) Enter the net total of each column as				
_	indicated below:		0		
	Corpus Add lines 3f, 4c, and 4e Subtract line 5				
	Prior years' undistributed income Subtract line 4b from line 2b		0		
С	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		
ч	Subtract line 6c from line 6b Taxable amount				
<u> </u>	—see instructions		0		
е	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				404 425
	be distributed in 2015				401,435
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		0		
	Analysis of line 9				
	Excess from 2011				
	Excess from 2012				
	Excess from 2013				
	Excess from 2014				
е	Excess from 2015				000 PF (22:=
				Forn	n 990-PF (2015)

	m 990-PF (2015)					Page 10
	Part XIV Private Operating Founda				1 9)	
la	If the foundation has received a ruling or deter foundation, and the ruling is effective for 2015					
b	Check box to indicate whether the organization	n <u>is a private operat</u>	ting foundation de	scribed in section	4942(J)(3) or	74942(j)(5)
2a	Enter the lesser of the adjusted net	Tax year		Prior 3 years		(e) Total
	income from Part I or the minimum investment return from Part X for each	(a) 2015	(b) 2014	(c) 2013	(d) 2012	(0) 1010.
	year listed					
	85% of line 2a					
	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					
е	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					
а	"Assets" alternative test—enter					
	(1) Value of all assets				+	
b	(2) Value of assets qualifying under section 4942(j)(3)(B)(i) "Endowment" alternative test— enter 2/3					
U	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)				1	
	(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					
D-	(4) Gross investment income art XV Supplementary Information ((Complete this	naut anly if th		had to 000 a	- mara In
- 0	assets at any time during the			ie organizacio	ii iiau \$5,000 0i	i illore ili
ι	Information Regarding Foundation Managers:	,				
а	List any managers of the foundation who have				,	ation
	before the close of any tax year (but only if the	ey have contributed	more than \$5,00	0) (See section 5	07(d)(2))	
	WILLIAM P EGAN					
b	List any managers of the foundation who own 1	.0% or more of the s	stock of a corpora	ation (or an equally	large portion of the	<u> </u>
	ownership of a partnership or other entity) of w				3 1	
2	Information Regarding Contribution, Grant, Gi	ft, Loan, Scholarshi	p, etc., Programs:	l		
	Check here $\blacktriangleright \overline{m{erp}}$ if the foundation only makes	· ·			•	
	unsolicited requests for funds If the foundation other conditions, complete items 2a, b, c, and		ts, etc (see instri	uctions) to individ	uals or organization	s under
а	The name, address, and telephone number or	email address of the	e person to whom	applications shou	ld be addressed	
Ь	The form in which applications should be subr	mitted and informati	on and materials	they should includ	e	
				,		
c	: Any submission deadlines					
					_	
d	Any restrictions or limitations on awards, suc	h as by geographica	al areas, charitabl	le fields, kinds of i	nstitutions, or other	-
	factors					

Form 990-PF (2015)

Part XV Supplementary Information(continued) Page **11**

Supplementary Inform				
3 Grants and Contributions Paid		proved for F	uture Payment	
Recipient	If recipient is an individual, show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	A mount
Name and address (home or business)	or substantial contributor	recipient	Contribution	
a Paid during the year See Additional Data Table				
Total			▶ 3a	471,000
b Approved for future payment Total			▶ 3b	0

Enter gros	s amounts unless otherwise indicated	Unrelated bu	siness income	Excluded by section	512, 513, or 514	(e) Related or exempt
1 Progran	n service revenue	(a) Business code	(b) A mount	(c) Exclusion code	(d) A mount	function income (See instructions)
						,
f	and contracts from government agencies					
2 Member 3 Interes	ership dues and assessments st on savings and temporary cash ments					
	nds and interest from securities			14	274,234	
	ntal income or (loss) from real estate					
	financed property ebt-financed property					
6 Net rer proper	ntal income or (loss) from personal ty					
8 Gain o	nvestment income. r (loss) from sales of assets other than ory			18	445,062	
	ome or (loss) from special events profit or (loss) from sales of inventory					
	revenue a					
ь						
					719,296	l
13 Total.A	al Add columns (b), (d), and (e) dd line 12, columns (b), (d), and (e) worksheet in line 13 instructions to verify				13	719,296
13 Total. A (See w	dd line 12, columns (b), (d), and (e) vorksheet in line 13 instructions to verify Relationship of Activities to	calculations) the Accomp	olishment of E	xempt Purpos	es	719,296
13 Total. A (See w	dd line 12, columns (b), (d), and (e) vorksheet in line 13 instructions to verify	calculations) o the Accomplich income is rep	olishment of E		es ontributed importa	719,296 ntly to
13 Total.A (See w Part XVI Line No.	dd line 12, columns (b), (d), and (e). vorksheet in line 13 instructions to verify Relationship of Activities to Explain below how each activity for wh the accomplishment of the foundation's	calculations) o the Accomplich income is rep	olishment of E		es ontributed importa	719,296 ntly to
13 Total.A (See w Part XVI Line No.	dd line 12, columns (b), (d), and (e). vorksheet in line 13 instructions to verify Relationship of Activities to Explain below how each activity for wh the accomplishment of the foundation's	calculations) o the Accomplich income is rep	olishment of E		es ontributed importa	719,296 ntly to
13 Total.A (See w Part XVI Line No.	dd line 12, columns (b), (d), and (e). vorksheet in line 13 instructions to verify Relationship of Activities to Explain below how each activity for wh the accomplishment of the foundation's	calculations) o the Accomplich income is rep	olishment of E		es ontributed importa	719,296 ntly to
13 Total.A (See w Part XVI Line No.	dd line 12, columns (b), (d), and (e). vorksheet in line 13 instructions to verify Relationship of Activities to Explain below how each activity for wh the accomplishment of the foundation's	calculations) o the Accomplich income is rep	olishment of E		es ontributed importa	719,296 ntly to
13 Total.A (See w Part XVI Line No.	dd line 12, columns (b), (d), and (e). vorksheet in line 13 instructions to verify Relationship of Activities to Explain below how each activity for wh the accomplishment of the foundation's	calculations) o the Accomplich income is rep	olishment of E		es ontributed importa	719,296 ntly to
13 Total.A (See w Part XVI Line No.	dd line 12, columns (b), (d), and (e). vorksheet in line 13 instructions to verify Relationship of Activities to Explain below how each activity for wh the accomplishment of the foundation's	calculations) o the Accomplich income is rep	olishment of E		es ontributed importa	719,296 ntly to
13 Total.A (See w Part XVI Line No.	dd line 12, columns (b), (d), and (e). vorksheet in line 13 instructions to verify Relationship of Activities to Explain below how each activity for wh the accomplishment of the foundation's	calculations) o the Accomplich income is rep	olishment of E		es ontributed importa	719,296 ntly to
13 Total.A (See w Part XVI Line No.	dd line 12, columns (b), (d), and (e). vorksheet in line 13 instructions to verify Relationship of Activities to Explain below how each activity for wh the accomplishment of the foundation's	calculations) o the Accomplich income is rep	olishment of E		es ontributed importa	719,296 ntly to
13 Total.A (See w Part XVI Line No.	dd line 12, columns (b), (d), and (e). vorksheet in line 13 instructions to verify Relationship of Activities to Explain below how each activity for wh the accomplishment of the foundation's	calculations) o the Accomplich income is rep	olishment of E		es ontributed importa	719,296 ntly to
13 Total.A (See w Part XVI Line No.	dd line 12, columns (b), (d), and (e). vorksheet in line 13 instructions to verify Relationship of Activities to Explain below how each activity for wh the accomplishment of the foundation's	calculations) o the Accomplich income is rep	olishment of E		es ontributed importa	719,296 ntly to
13 Total.A (See w Part XVI Line No.	dd line 12, columns (b), (d), and (e). vorksheet in line 13 instructions to verify Relationship of Activities to Explain below how each activity for wh the accomplishment of the foundation's	calculations) o the Accomplich income is rep	olishment of E		es ontributed importa	719,296 ntly to
13 Total.A (See w Part XVI Line No.	dd line 12, columns (b), (d), and (e). vorksheet in line 13 instructions to verify Relationship of Activities to Explain below how each activity for wh the accomplishment of the foundation's	calculations) o the Accomplich income is rep	olishment of E		es ontributed importa	719,296 ntly to
13 Total.A (See w Part XVI Line No.	dd line 12, columns (b), (d), and (e). vorksheet in line 13 instructions to verify Relationship of Activities to Explain below how each activity for wh the accomplishment of the foundation's	calculations) o the Accomplich income is rep	olishment of E		es ontributed importa	719,296 ntly to
13 Total.A (See w Part XVI Line No.	dd line 12, columns (b), (d), and (e). vorksheet in line 13 instructions to verify Relationship of Activities to Explain below how each activity for wh the accomplishment of the foundation's	calculations) o the Accomplich income is rep	olishment of E		es ontributed importa	719,296 ntly to
13 Total.A (See w Part XVI Line No.	dd line 12, columns (b), (d), and (e). vorksheet in line 13 instructions to verify Relationship of Activities to Explain below how each activity for wh the accomplishment of the foundation's	calculations) o the Accomplich income is rep	olishment of E		es ontributed importa	719,296 ntly to

Part XVI	Information Re	egarding T	ransfers T	o and Trans	actions	s and R	Relationships \	With		1 4	ye . .
	Noncharitable							Т	ı	1	
	rganızatıon dırectly or ı 501(c) of the Code (othe									Yes	No
organızat	ions?										
a Transfers	s from the reporting four	ndation to a no	ncharitable e	exempt organiza	tion of						
(1) Casl	h								1a(1)		No
(2) Othe	erassets								1a(2)		No
b Other tra											
(1) Sale	s of assets to a noncha	ritable exemp	t organizatior	n				-	1b(1)		No
(2) Purc	hases of assets from a	noncharitable	exempt orga	inization				H	1b(2)		No
	cal of facilities, equipme							-	1b(3)		No
	nbursement arrangemer								1b(4)		No
(5) Loar	ns or loan guarantees.							-	1b(5)		No
(6) Perfor	mance of services or m	embership or	fundraising s	olicitations					1b(6)		No
-	of facilities, equipment,		•					L	1 c		No
of the go	swer to any of the above ods, other assets, or se ansaction or sharing arr (b) Amount involved	rvices given b angement, sho	y the reportion ow in column	ng foundation It	the foun the good	ndation re ds, other	eceived less than	fair marke es received	t value d		nts
						•	•	<u> </u>			
des crībeo √ No	undation directly or indidin section 501(c) of the complete the following (a) Name of organization	ne Code (other	than section		n sectioi			• • • • ion of relation	·	es	
							·				
		· · · ·									
the	der penalties of perjury, best of my knowledge a ormation of which prepar	ınd belief, it is	true, correct								
Sign Here	*****			2017-01-19	_ •	*****		return	e IRS dı: e prepar		
	Signature of officer or t	rustee		Date	, ,	Tıtle			str)?	Yes N	10
	Print/Type preparer's DAVID DESMARAI		eparer's Sıgn	ature	Date		Check if self- employed ▶ ☐	PTIN PO	04357	27	
Paid Preparer Use		A & CO LTD					Firm's EIN ▶ 05	-0409384	1		
Only	Firm's address ► 99 SUMMER STREET 02110	SUITE 520 E	OSTON, MA				Phone no (617)	236-809	8		

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, (b) Date acquired (d) (a) 2-story brick warehouse, or common stock, 200 shs MLC Co) How acquired (c) (mo, day, yr) Date sold (mo, day, yr) P-Purchase D-Donation CHOATE HALL & STEWART LLP Ρ 2016-09-30 **FIDELITY** Ρ 2016-09-30 **FIDELITY** D 2016-09-30 HIGHFIELDS CAPITAL (MARK-TO-MARKET) Ρ 2016-09-30 Ρ CLASS ACTION PROCEEDS 2016-09-30 CAPITAL GAINS DIVIDENDS Ρ Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h (e) Gross sales price Depreciation allowed Cost or other basis Gain or (loss) (f) (or allowable) (g) plus expense of sale (h) (e) plus (f) minus (g) 4,401,390 4,305,770 95,620 133,715 147,804 -14,089798,035 537,767 260,268 320,592 320,592 117 117 28,445 28,445 Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - I 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 Excess of col (i) (i) F M V as of 12/31/69 Adjusted basis (1) Losses (from col (h)) (i) as of 12/31/69 (k) over col (j), if any 95,620 -14,089 260,268 320,592 117

orm 990PF Part XV Line 3 - Gr	ants and Contributions	Paid During	the Year or Approved for	Future Payment
Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	A mount
a Paid during the year				
BIG BROTHERS BIG SISTERS OF MASS BAY 75 FEDERAL STREET BOSTON,MA 02110	NONE	PUBLIC CHARITY	GENERAL	10,000
BOYS AND GIRLS CLUB OF NEWPORT COUNTY 95 CHURCH STREET NEWPORT,RI 02840	NONE	PUBLIC CHARITY	GENERAL	65,000
CATHOLIC SCHOOLS FOUNDATION 260 FRANKLIN STREET 630 BOSTON,MA 02110	NONE	PUBLIC CHARITY	GENERAL	10,000
CYSTIC FIBROSIS FOUNDATION 556 MONTGOMERY FERRY DRIVE ATLANTA,GA 30324	NONE	PUBLIC CHARITY	GENERAL	10,000
EPIC CAMPS 6679 SANTA BARBARA ROAD STE C ELKRIDGE, MD 21075	NONE	PUBLIC CHARITY	GENERAL	2,000
FAIRFIELD UNIVERSITY 1073 N BENSON ROAD FAIRFIELD,CT 06824	NONE	PUBLIC CHARITY	GENERAL	5,000
FRIENDS OF THE PUBLIC GARDEN 69 BEACON STREET BOSTON,MA 02108	NONE	PUBLIC CHARITY	GENERAL	5,000
HOPE FUNDS FOR CANCER RESEARCH 174 BELLEVUE AVE STE 311 NEWPORT, RI 02840	NONE	PUBLIC CHARITY	GENERAL	10,000
ISABELLA STEWART GARDNER MUSEUM 25 EVANS WAY BOSTON,MA 02115	NONE	PUBLIC CHARITY	GENERAL	25,000
MARTIN LUTHER KING JR COMMUNITY CENTER 20 DR MARCUS F WHEATLAND BLVD NEWPORT, RI 02840	NONE	PUBLIC CHARITY	GENERAL	10,000
MY BROTHER'S KEEPER PO BOX 338 EASTON,MA 02356	NONE	PUBLIC CHARITY	GENERAL	5,000
NEW ENGLAND PROVIDENCE OF JESUITS PO BOX 9199 WATERTOWN,MA 02471	NONE	PUBLIC CHARITY	GENERAL	10,000
NEWPORT ANTIQUES SHOW - NEWPORT HISTORICAL SOCIETY 82 TOURO STREET NEWPORT,RI 02840	NONE	PUBLIC CHARITY	GENERAL	5,000
NEWPORT ART MUSEUM 76 BELLEVUE AVE NEWPORT,RI 02840	NONE	PUBLIC CHARITY	GENERAL	10,000
NEWTON WELLESLEY HOSPITAL CHARITABLE FOUNDATION 2014 WASHINGTON STREET NEWTON,MA 02462	NONE	PUBLIC CHARITY	GENERAL	6,000
Total			▶ 3a	471,000

Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	A mount
Name and address (home or business)	any foundation manager or substantial contributor	recipient		
a Paid during the year				
PRESERVATION SOCIETY OF NEWPORT 424 BELLEVUE AVE NEWPORT,RI 02840	NONE	PUBLIC CHARITY	GENERAL	73,000
PROVIDENCE COLLEGE 1 CUNNINGHAM SQUARE PROVIDENCE,RI 02918	NONE	PUBLIC CHARITY	GENERAL	50,000
R I BREAKERS 6 JOHN F KENNEDY CIRCLE NORTH PROVIDENCE,RI 02904	NONE	PUBLIC CHARITY	GENERAL	5,000
REDWOOD LIBRARY 50 BELLEVUE AVE NEWPORT,RI 02840	NONE	PUBLIC CHARITY	GENERAL	10,000
SKEFFINGTON PAWSOX FOUNDATION PO BOX 2365 PAWTUCKET,RI 02861	NONE	PUBLIC CHARITY	GENERAL	25,000
ST SEBASTIAN'S SCHOOL 1191 GREENDALE AVE NEEDHAM,MA 02492	NONE	PUBLIC CHARITY	GENERAL	25,000
THOMAS G CAVANAGH MEMORIAL FUND 97 OVERHILL ROAD WARWICK,RI 02818	NONE	PUBLIC CHARITY	GENERAL	5,000
WHARTON SCHOOL AT THE UNIVERSITY OF PENNSYLVANIA 344 VANCE HALL 3733 SPRUCE ST PHILADELPHIA,PA 19104	NONE	PUBLIC CHARITY	GENERAL	50,000
YEAR UP 10 DORRANCE STREET STE 1108 PROVIDENCE,RI 02903	NONE	PUBLIC CHARITY	GENERAL	25,000
YMCA OF GREATER BOSTON 316 HUNTINGTON AVE BOSTON,MA 02115	NONE	PUBLIC CHARITY	GENERAL	15,000

cine dicki file print De Nei i Redlas	AS THEU BULU		2111 33 132023003		
TY 2015 Accounting Fees Schedule					
Name:	DUNIRY FOUNDATION C/O CHOATE LLP				
EIN:	04-6746970				
	I				

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TAX PREP

TAX PREP

KLR - ACCOUNTING &

224 01 01 10370				
Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BAKER NEWMAN & NOYES LLC - ACCOUNTING &	4,500	2,250		2,250

2,700

2,700

DLN: 93491025003007

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	 LN: 93491025003007
TY 2015 Investments Corpora	te Bonds Schedule	
Name:	DUNIRY FOUNDATION	
	C/O CHOATE LLP	
EIN:	04-6746970	

EIN: 04-6/469/0		
Name of Bond	End of Year Book Value	End of Year Fair Market Value

CHOATE HALL & STEWART LLP

740,233

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	D	LN: 93491025003007
TY 2015 Investments Corpora	te Stock Schedule		
Name:	DUNIRY FOUNDATION		
	C/O CHOATE LLP		
EIN:	04-6746970		
Name of Stock	«	End of Year Book Value	End of Year Fair Market Value
CHOATE HALL & STEWART LLP		6,647,931	8,082,212
FIDELITY		1,588,305	1,654,119

efile GRAPHIC print - DO NOT PROCESS	DLN	l: 93491025003007	
TY 2015 Investments - Other S	Schedule		
	DUNIRY FOUNDATION		
	C/O CHOATE LLP		
EIN:	04-6746970		
Category/ Item	Listed at Cost of FMV	r Book Value	End of Year Fair Market Value
CHOATE HALL & STEWART LLP	AT COST	2,314,728	2,394,587
HIGHFIELDS CAPITAL	FMV	2,392,264	2,392,264

AT COST

AT COST

AT COST

37,224

44,775

82,614

40,103

45,954

95,197

CEDAR FAIR

FIDELITY

BLACKSTONE GROUP LP

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PARTNERSHIP EXPENSES

Name: DUNIRY FOUNDATION

C/O CHOATE LLP

EIN: 04-6746970

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MA FORM PC FILING FEE	70	0		70

583

583

DLN: 93491025003007

Name: DUNIRY FOUNDATION

C/O CHOATE LLP

EIN: 04-6746970

13,821

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AUREUS ASSET MANAGEMENT

LLC

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CHOATE HALL & STEWART LLP - INVESTMENT & FIDUCIARY FEES	70,928	53,196		17,732

13,821

DLN: 93491025003007

TY 2015 Taxes Schedule				
Name:	DUNIRY FOUNDATION C/O CHOATE LLP			

DLN: 93491025003007

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FEDERAL EXCISE TAXES PAID

EIN: U4-6/469/U				
Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes

04 6746070

efile GRAPHIC print -	DO NOT PROCESS	As Filed Data -			DLN: 93491025003007
Schedule B		Schedu	le of Contributors		OMB No 1545-0047
(Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	► Information abo	► Attach to F out Schedule B (For	orm 990, 990-EZ, or 990-PF rm 990, 990-EZ, or 990-PF) and its instruc <u>w irs gov/form990</u>	tions is at	2015
Name of the organization				Employer id	entification number
C/O CHOATE LLP				04-674697	0
Organization type (ch	eck one)				
Filers of:	Section:				
Form 990 or 990-EZ	┌─ 501(c)()(enter number) orga	anization		
	T 4947(a)(1)	nonexempt charita	ble trust not treated as a private foundation	on	
	☐ 527 politica	lorganization			
Form 990-PF	√ 501(c)(3) €	exempt private foun	dation		
	T 4947(a)(1)	nonexempt charita	ble trust treated as a private foundation		
	[501(c)(3) t	axable private foun	dation		
other property Special Rules For an organizate under sections 6) from any one contribution described in section (509(a)(1) and 170(b)(1)	itor Complete Parts n 501(c)(3) filing Fo)(A)(vi), that check	nat received, during the year, contributions is I and II. See instructions for determining a common series of the	a contributor's t pport test of the t II, line 13, 16a	e regulations , or 16b, and that
	ny one contributor, dur or (ii) Form 990-EZ, line		ontributions of the greater of (1) \$5,000 or I and II	' (2) 2% of the	amount on (i) Form 990,
during the year,		ore than \$1,000 <i>ex</i>	(10) filing Form 990 or 990-EZ that receiv clusively for religious, charitable, scientificate Parts I, II, and III		
during the year, this box is checl purpose Do not	contributions exclusive ked, enter here the total complete any of the pa	ely for religious, cha I contributions that arts unless the Ger	(10) filing Form 990 or 990-EZ that receive aritable, etc., purposes, but no such controver received during the year for an excentral Rule applies to this organization become during the year	ibutions totaled <i>lusively</i> religiou ause it receive	more than \$1,000 If us, charitable, etc , ed nonexclusively
990-EZ, or 990-PF), but	ıt must answer "No" o	on Part IV, line 2, of	and/or the Special Rules does not file Sch its Form 990, or check the box on line Ho ses not meet the filing requirements of Sch	f its	

Name of organization DUNIRY FOUNDATION C/O CHOATE LLP Employer identification number 04-6746970

Part I	Contributors (see instructions) Use duplicate copies of Part I if additional s	pace is needed	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1			Person √
	WILLIAM P EGAN 1256 PELICAN LANE	_	Payroll
		\$ 5,808,043	Noncash √
	DELRAY BEACH, FL 33483		(Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
			Person
			Payroll
		_	Noncash —
			(Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
			Person
			Payroli
		_	Noncash —
			(Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
			Person
			Payroll
			Noncash —
			(Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
			Person
			Payroll
		_	Noncash —
			(Complete Part II for noncash contributions)
(a)	(b)	(c)	(d)
No.	Name, address, and ZIP + 4	Total contributions	Type of contribution Person
			Payroll
		\$	1 ayron
			Noncash
			(Complete Part II for noncash contributions)

Name of organiza DUNIRY FOUND		Employer identification no	umber
ONIRY FOUND ON CHOATE LL		04-6746970	
Part II	Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed		
(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	VARIOUS PUBLICLY TRADED SECURITIES	\$ 1,808 043	2015-11-17
(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		s	
(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		s	
(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received

Page 3

nan \$1,000 for the year from any o or organizations completing Part	(c) Use of gift (c) Use of gift (c) Use of gift (c) Use of gift (e) Transfer of gift (e) Transfer of gift (e) Transfer of gift	oloyer identification number 6746970 In section 501(c)(7), (8), or (10) that is (a) through (e) and the following ligious, charitable, etc., contributions (d) Description of how gift is held ationship of transferor to transferee (d) Description of how gift is held
nan \$1,000 for the year from any or organizations completing Part ess for the year. (Enter this infor copies of Part III if additional space is (b) Purpose of gift Transferee's name, address, and (b) Purpose of gift	utions to organizations described one contributor. Complete column III, enter the total of exclusively rermation once. See instructions.) ▶ needed (c) Use of gift (e) Transfer of gift (c) Use of gift (c) Use of gift (e) Transfer of gift	in section 501(c)(7), (8), or (10) that is (a) through (e) and the following ligious, charitable, etc., contributions (d) Description of how gift is held
nan \$1,000 for the year from any or organizations completing Part ess for the year. (Enter this infor copies of Part III if additional space is (b) Purpose of gift Transferee's name, address, and (b) Purpose of gift	utions to organizations described one contributor. Complete column III, enter the total of exclusively rermation once. See instructions.) ▶ needed (c) Use of gift (e) Transfer of gift (c) Use of gift (c) Use of gift (e) Transfer of gift	in section 501(c)(7), (8), or (10) that is (a) through (e) and the following ligious, charitable, etc., contributions (d) Description of how gift is held
Transferee's name, address, an (b) Purpose of gift	(e) Transfer of gift Rel (c) Use of gift (e) Transfer of gift	ationship of transferor to transferee
(b) Purpose of gift	(c) Use of gift (e) Transfer of gift	
(b) Purpose of gift	(c) Use of gift (e) Transfer of gift	
	(e) Transfer of gift	(d) Description of how gift is held
Transferoe's name address an	``,	
Transferce & Harre, address, an	nd∠IP4 Rel	ationship of transferor to transferee
(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
Transferee's name, address, an	(e) Transfer of gift and ZIP4 Rel	ationship of transferor to transferee
(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
Transferee's name, address, an	(e) Transfer of gift Rel	ationship of transferor to transferee
	Transferee's name, address, and (b) Purpose of gift	(e) Transfer of gift Transferee's name, address, and ZIP4 (b) Purpose of gift (c) Use of gift (e) Transfer of gift

Schedule B (Form 990, 990-EZ, or 990-PF) (2015)