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 separate instructions is at www.lrs.gov/form990pf.

OMB No 1545-0052

For	alen	dar year 2016 or tax year beginning		, and ending		
Nar	ne of	foundation		<u> </u>	A Employer identification	number
J	AM)	ES & BETTY JACOBS FAMIL	Y]	
C	HAJ	RITABLE TRUST C/O JEFF	JACOBS		01-0511399	
Nun	ber a	nd street (or P O box number if mail is not delivered to street	address)	Room/suite	B Telephone number	
_3	00	HOUGHTON POND RD.			(207) 989-	0167
		own, state or province, country, and ZIP or foreign p	ostal code		C If exemption application is p	ending, check here
W	ES'	r BATH, ME 04530]	
G (heck	all that apply: Initial return	Initial return of a fo	ormer public charity	D 1. Foreign organizations	, check here
		Final return	Amended return		2. Foreign organizations me	eting the 85% test
		Address change	Name change		2. Foreign organizations me check here and attach co	mputation
H (_	type of organization: X Section 501(c)(3) ex			E If private foundation stat	
<u> </u>			Other taxable private founda		under section 507(b)(1)	• **
		rket value of all assets at end of year J Account	•	Accrual	F If the foundation is in a 6	
(11 		Part II, col. (c), line 16) 0: 4 , 0 4 3 , 7 3 9 . (Part I, colu	ther (specify)	hasis I	under section 507(b)(1)	(B), check here
		Analysis of Revenue and Expenses	(a) Revenue and	(b) Net investment	(a) Adjusted not	(d) Disbursements
1.6		(The total of amounts in columns (b), (c), and (d) may not necessanty equal the amounts in column (a))	expenses per books	income	(c) Adjusted net income	for charitable purposes (cash basis only)
	1	Contributions, gifts, grants, etc., received	9.		 	(sacri sacris siny)
		Check X if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments	1,501.	1,501.	1,501.	STATEMENT 1
	4	Dividends and interest from securities	100,093.	50,575.		STATEMENT 2
Revenue	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	<27,753.	>		
	b	Gross sales price for all assets on line 6a1,619,358.		1		
	7	Capital gain net income (from Part IV, line 2)	RECEIV	ED 0.		
Œ	8	Net short-term capital gain		70	N/A	
	9	Income modifications Gross sales less returns	19 APR 17	2017		
	10a	and allowances	S Ark I	3 (/):		
		Less Cost of goods sold	CODEN	<u> </u>		
	i .	Gross profit or (loss) Other income	OGDEN	IIT		
	12	Total. Add lines 1 through 11	73,850.	52,076.	101,594.	
	13	Compensation of officers, directors, trustees, etc	40,500.	32,0,0	0.	40,500.
	14	Other employee salaries and wages	10,000			20,000
	1	Pension plans, employee benefits				
Ses		Legal fees			 	
sesúéc	ייי	Accounting fees STMT 3	1,200.	0.	0.	1,200.
) C	Other professional fees STMT 4	23,376.	19,376.	19,376.	4,000.
9	17	Interest				
rat	18	Taxes STMT 5	4,616.	4,616.	4,616.	0.
nist	19	Depreciation and depletion				
<u>></u> ξ	20	Occupancy	L			
` ` ₹	21	Travel, conferences, and meetings				
ڲۊ	22	Printing and publications			ļ	
ڪنڌ م⇔ق	23	Other expenses STMT 6	47.	0.	0.	47.
(よりん もん といい) Operating and Administrative Ext	24	Total operating and administrative	60 730	22 002	22 002	AE 747
⊃ĕ.	25	expenses. Add lines 13 through 23	69,739.	23,992.	23,992.	45,747. 148,900.
6		Contributions, gifts, grants paid	148,900.	 -	 	140,300.
	20	Total expenses and disbursements. Add lines 24 and 25	218,639.	23,992.	23,992.	194,647.
_	27	Subtract line 26 from line 12:	210,039.	43,332.	43,334.	174,04/0
	ĺ	Excess of revenue over expenses and disbursements	<144,789.	b		İ
		Net investment income (if negative, enter -0-)	1144,100.	28,084.	,	
_		Adjusted net income (if negative, enter -0-)		, , , , , , , , , , , , ,	77,602.	

623501 11-23-16 LHA For Paperwork Reduction Act Notice, see Instructions.

CHARITABLE TRUST Form 990-FF (2016)

C/O JEFF JACOBS 01-0511399 Page 2 Beginning of year End of year Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of year amounts only (a) Book Value (b) Book Value (c) Fair Market Value Cash - non-interest-bearing 227,324. 513,165 513,165. 2 Savings and temporary cash investments 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 7 Other notes and loans receivable Less; allowance for doubtful accounts 8 Inventories for sale or use 9 Prepaid expenses and deferred charges 1,832,926. 1,980,319. 1,191,409. 1,214,167. 10a Investments - U.S. and state government obligations STMT 2,191,365. 2,290,065. STMT **b** Investments - corporate stock STMT 9 26,471. 26,312. 26,342. c Investments - corporate bonds 11 Investments - land, buildings, and equipment basis Less accumulated depreciation 12 Investments - mortgage loans 13 Investments - other 14 Land, buildings, and equipment: basis Less accumulated depreciation 15 Other assets (describe ▶ 16 Total assets (to be completed by all filers - see the 4,067,040. 3,922,251. 4,043,739. instructions. Also, see page 1, item I) 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 22 Other liabilities (describe 0 . 0 23 Total liabilities (add lines 17 through 22) ► X Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. or Fund Balances 4,067,040. 3,922,251. 24 Unrestricted 25 Temporarily restricted 26 Permanently restricted Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 4,067,040. 3,922,251. 30 Total net assets or fund balances 4,067,040. 3,922,251 31 Total liabilities and net assets/fund balances 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) 4,067,040 2 Enter amount from Part I, line 27a 2 <144,789.> 3 Other increases not included in line 2 (itemize) Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize)

6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 3,922,251 Form **990-PF** (2016)

Part IV Capital Gains an	d Losses for Tax on In	vestment	Income					
	the kind(s) of property sold (e.g. ouse; or common stock, 200 shs			ľΡ	How acquire - Purchase - Donation) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a								
b SEE ATTACHED S	TATEMENT			<u> </u>		-		
<u>c</u>								
d						-		
<u>e</u>				L.,				
(e) Gross sales price	(f) Depreciation allowed (or allowable)		t or other basis xpense of sale				(h) Gain or (lo: (e) plus (f) minu	
a	·			_				
b								
C				-				
d			7 CAH 11	<u>_</u>				27 752
e 1,619,358.	- 		1,647,11	<u> </u>				<27,753.
Complete only for assets showing g						(1) (iains (Col. (h) ga	in minus
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69		cess of col. (1) col. (j), if any			toi. († 	(), but not less the cosses (from co	l. (h))
a								
b								
С								
d								
е								<27,753.
	∫ If gain, also enter	ın Part I line	7	7				
2 Capital gain net income or (net capita)	2			<27,753.
3 Net short-term capital gain or (loss) a	as defined in sections 1222(5) an	ıd (6):						
If gain, also enter in Part I, line 8, coli	umn (c).			- 1	ļ			22.452
If (loss), enter -0- in Part I, line 8	· · · · · · · · · · · · · · · · · ·				3			<39,158.
Part V Qualification Und	ier Section 4940(e) for	Reduced	lax on Net	Inv	estmen	inco	me 	
(For optional use by domestic private for	undations subject to the section 4	4940(a) tax on	net investment in	come	e.)			
If section 4940(d)(2) applies, leave this p	nort blank							
ii section 4940(0)(2) applies, leave this p	part blatik,							
Was the foundation liable for the section	4942 tax on the distributable am	ount of any ye	ar in the base per	10d?				Yes X No
If "Yes," the foundation does not qualify								
1 Enter the appropriate amount in each	h column for each year; see the I	nstructions bef	ore making any e	ntries	S.			
(a) Base period years	(b)			(c)			Dist	(d) tribution ratio
Calendar year (or tax year beginning i	n) Adjusted qualifying dis	tributions	Net value of no				(col. (b)	divided by col. (c))
2015	19	2,675.		3	,927,	542.		.049056
2014	12	0,000.		1	,912,	430.		.062747
2013		1,985.			31,	856.	1	.062312
2012		2,185.				727.	 	.068869
2011		2,200.				118.	 	.066429
	·						 	
2 Total of line 1, column (d)							,	.309413
		l Ob. 5					2	• 303413
3 Average distribution ratio for the 5-ye		on line 2 by 5,	or by the number	or ye	ears		1.1	0.01.000
the foundation has been in existence	if less than 5 years						3	.061883
4. Enter the net value of nearhestable	van annata far 2010 fram Dart V	line E					1 .	4 024 757
4 Enter the net value of noncharitable-	use assets for 20 to from Part X,	line 5				••	4	4,034,767.
5 14 15 1 1 1 1 1 1							} _	240 602
5 Multiply line 4 by line 3						••	5	249,683.
							1	004
6 Enter 1% of net investment income (1% of Part I, line 27b)					-	6	281.
							1 1	
7 Add lines 5 and 6							7	249,964.
9 Enter qualifiana diatabutana firan D	art VII. line A							104 647
8 Enter qualifying distributions from Pa	·						8	194,647.
If line 8 is equal to or greater than lin	e 7, check the box in Part VI, line	t 1b, and comp	lete that part usin	ig a 1	% tax rate.			
See the Part VI instructions.								

Part VII. Excise Tax Based on Investment Income (Section 4940(a), 4940(a), or 4948 - see instructions) I sempt operating fundations described in section 4940(c)(c) chick here. July and enter YW on line 1. Date of ruling or determination letter: (attack doay of letter if described in 1940 (c) requirements in Part V, check here. July and enter YW on line 1. Date of ruling or determination that meet the section 4940(c) requirements in Part V, check here. July and enter YW on line 1. Date of Part, line 270 A doll their damage is calcium 4947(a) (1) trusts and taxable foundations only. Others enter -0-) 3 5.562. Tax under section 51 (domestic section 4947(a) (1) trusts and taxable foundations only. Others enter -0-) 5 3 5.652. Substitia (income) box (demestic section 4947(a) (1) trusts and taxable foundations only. Others enter -0-) 5 Tax based on investment income. Subtract line of from line 3. It zero of less, enter -0-) 6 4 1,800. 6 8 1,800. 6 8 1,800. 6 8 1,800. 6 8 2 1,800. 6 8 2 1,800. 6 8 3 5.652. Tax and application for extension of line to bis (Form 8868) 6 9 1,800. 6 9 1,800. 6 9 1,800. 6 9 1,800. 6 1,800. 7 1,800. 7 1,800. 7 1,800. 7 1,800. 7 1,800. 7 1,800. 7 1,800. 7 1,800. 7 1,800. 7 1,800. 7 1,800. 8 1,	_		511399		Page 4
Date of ruling or determination (latter:			ee msm	101101	ISJ
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here □ and enter 1% of Part I, line 12 27b All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, cot. (b). 2 Tax under section 51 (domestic section 4947(a)(1) trusts and faxable foundations only. Others enter -0-) 3 3 562. 4 Subtlat A (income) lax (domestic section 4947(a)(1) trusts and faxable foundations only. Others enter -0-) 5 Tax based on investment income, Subtract line 4 from Ina 8. It zero or less, enter -0-) 5 Tax based on investment income, Subtract line 4 from Ina 8. It zero or less, enter -0-) 5 Tax based on application for extensions of time to life (Form Ina 8.) 6 Exempt foreign organizations— tax withheld at source 1 Tax goal with application for extensions of time to life (Form 8869) 6 Exempt foreign organizations— tax withheld at source 1 Tax goal with application for extensions of time to life (Form 8869) 6 Exiting any penalty for enderpyiment of estimated flux. Check here □ of form 2220 is attached 8 Exiting penalty for enderpyiment of estimated flux. Check here □ of form 2220 is attached 9 Tax due. If the total of line 5 and 8 is more than line 7, enter amount of weed 10 overapiment. Illied 7 is more than 100 during the line 1 in the total of line 3 of 8, center has amount of weed 10 be. Credited to 2017 estimated flux ▶ 1, 238. Retunded ▶ 11 238. 11 Enter the amount of the 10 be. Credited to 2017 estimated flux ▶ 1, 238. Retunded ▶ 11 2. 38. 12 Line flux because in the security of the control of the decrease of any materials published or of starbuled by the foundation manager. 1 Dear the transfer of the security of the securities of the extreme in any potitical campaging? 1 Dear the security of the condition in 120-P0. In this year? 1 If the answers is 'Yes' to 1 are 1, attach a desirable descendation of the activities and captes of any materials published or of starbuled by the foundation managers. In the securities and captes of	1a				
of Part I, line 27b				_	6 2
and lother domestic foundations entar 2% of line 27h. Exempt foreign organizations enter 4% of Part I, line 12, col. (b). 2 0 0. 3 3 562. 4 Subbite A (income) tax (domestic section 4947(a) (1) trusts and taxable foundations only, Others enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 6 Ceredist Payments: 2 20 is estimated tax payments and 2015 overpayment credited to 2016 8 Exempt foreign organizations - tax withheld at source 6 Tax pand with application for extension of time to the (Form 8868) 8 Exempt foreign organizations - tax withheld at source 6 Tax pand with application for extension of time to the (Form 8868) 8 Estimated and payments, Acid lines 5 and 1s more than line 7, enter amount ower paid 9 Tax due. If the total of lines 5 and 1s more than line 7, enter amount ower paid 1 Enter the amount of line 10 to be: Credited to 2017 estimated tax 1 Enter the amount of line 10 to be: Credited to 2017 estimated tax 1 Enter the amount of line 10 to be: Credited to 2017 estimated tax 1 During the tax year, of the foundation attempt to influence any restorial, state, or local legislation or did it participate or intervene in any policical campaign? 1 During the tax year, of the foundation attempt to influence any restorial, state, or local legislation or did it participate or intervene in any policical campaign? 1 During the tax year, of the foundation attempt to influence any restorial, state, or local legislation or did it participate or intervene in any policical campaign. 1 During the tax year, of the foundation attempt to influence any restorial, state, or local legislation or did it participate or intervene in any policical campaign. 1 During the tax year, of the foundation attempt to influence any policical legislation or 15, according to the condition o	Þ				04.
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Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T 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? 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 Ba Enter the states to which the foundation reports or with which it is registered (see instructions) ME 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 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 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? If "Yes," complete Part XIV 9 X 10 Did any persons become substantial contributors during the tax year? if "Yes," attach a schedule listing their names and addresses 10 X				+	
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	10		<u> </u>	├	
		und any personis deconic substantial continuous during the lax year? If "Yes," attach a schedule listing their names and addresses		0-PF	_

	JAMES & BETTY JACOBS FAMILY			
Form	1 990-PF (2016) CHARITABLE TRUST C/O JEFF JACOBS	01-0511399		Page 5
	art VII-A Statements Regarding Activities (continued)			
نــا			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of	1		
• • •	section 512(b)(13)? If "Yes," attach schedule (see instructions)	11	!	X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory	<u> </u>		
12		12		x
40	If "Yes," attach statement (see instructions)	13	Х	<u> </u>
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13_		<u> </u>
	Website address ► NONE	- 007 440 1	250	
14		▶ 207-449-1	250	
	Located at ► 300 HOUGHTON POND RD., WEST BATH, ME	ZIP+4 ▶04530		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here	•	. ▶	
	and enter the amount of tax-exempt interest received or accrued during the year	15 N	/A	
16	At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank,		Yes	No
	securities, or other financial account in a foreign country?	16	1	X
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the	<u> </u>		
	foreign country			
Pa	art VII-B Statements Regarding Activities for Which Form 4720 May Be Required			
نا	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Vac	No
1.	a During the year did the foundation (either directly or indirectly):		103	110
16		'es 🗓 No]	
		es LAL NO	1	
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)		1	
		'es 🗓 No	()	
		'es 🔀 No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	'es 🗶 No	i '	
	(5) Transfer any income or assets to a disqualified person (or make any of either available		1	
	for the benefit or use of a disqualified person)?	'es 🗶 No		
	(6) Agree to pay money or property to a government official? (Exception. Check "No"			
	If the foundation agreed to make a grant to or to employ the official for a period after			
		'es X No]	
		es LALINU	}	
,	b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations	37/3	Į į	
	section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	N/A 1b		
	Organizations relying on a current notice regarding disaster assistance check here		}	
(c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected		ļ i	
	before the first day of the tax year beginning in 2016?	1c	<u>L</u>	X
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));		Ì i	
	a At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginni	na		
		es X No	[]	
	If "Yes," list the years ▶ , , , ,		ļ	
	b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect	.,		
		l l]]	
	valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attac			
	statement - see instructions.)	N/A 2b	 	
1	c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	Ì		
	a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
3				
	during the year?	∕es 🛣 No	1	
	b If "Yes," did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation or disqualified persons a	iter		
	May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to			
	of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule			
	Form 4720, to determine if the foundation had excess business holdings in 2016)	N/A 3b		
A	a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	<u>† </u>	X
	• • • • • • • • • • • • • • • • • • • •		 	
	b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose had not been removed from increase to first day of the tay year beginning 20163.	1	1	v
	had not been removed from jeopardy before the first day of the tax year beginning in 2016?	<u></u>	<u> </u>	X
		Form 99	U-PF	(2016)

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JAMES & BETTY JACOBS FAMILY CHARITABLE TRUST C/O JEFF JACOBS 01-0511399 Form 990-PF (2016) Page 6 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: Yes X No (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, Yes X No any voter registration drive? Yes X No (3) Provide a grant to an individual for travel, study, or other similar purposes? (4) Provide a grant to an organization other than a charitable, etc., organization described in section Yes X No 4945(d)(4)(A)? (see instructions) (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for Yes X No the prevention of cruelty to children or animals? b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations N/A section 53.4945 or in a current notice regarding disaster assistance (see instructions)? 5b Organizations relying on a current notice regarding disaster assistance check here c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained N/A Yes No expenditure responsibility for the grant? 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 Yes X No a personal benefit contract? **b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 6b Х If "Yes" to 6b, file Form 8870 Yes X No 7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? N/A 7b b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors 1 List all officers, directors, trustees, foundation managers and their compensation. (c) Compensation (d) Contributions to employee benefit plans and deferred compensation (b) Title, and average hours per week devoted to position (e) Expense account, other (If not paid, enter -0-) (a) Name and address allowances JOHN R. JACOBS TRUSTEE

52 INDIAN POINT LANE				
HARBORSIDE, ME 04642	1.00	13,500.	0.	0.
JEFFERY A. JACOBS	TRUSTEE			-
300 HOUGHTON POND RD.	1			
WEST BATH, ME 04530	1.00	13,500.	0.	0.
THOMAS M. JACOBS	TRUSTEE			
15 CASTLE HILL DRIVE]			
BANGOR, ME 04401	1.00	13,500.	0.	0.
2 Compensation of five highest-paid employees (other than those in	cluded on line 1). If none,	enter "NONE."		
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
	(b) Title, and average hours per week devoted to position	(c) Compensation	employee benefit plans	(e) Expense account, other allowances
	(b) Title, and average hours per week devoted to position	(c) Compensation	employee benefit plans	(e) Expense account, other allowances
	(b) Title, and average hours per week devoted to position	(c) Compensation	employee benefit plans	(e) Expense account, other allowances
	(b) Title, and average hours per week devoted to position	(c) Compensation	employee benefit plans	(e) Expense account, other allowances
	(b) Title, and average hours per week devoted to position	(c) Compensation	employee benefit plans	(e) Expense account, other allowances
	(b) Title, and average hours per week devoted to position	(c) Compensation	employee benefit plans	(e) Expense account, other allowances
	(b) Title, and average hours per week devoted to position	(c) Compensation	employee benefit plans	(e) Expense account, other allowances
	(b) Title, and average hours per week devoted to position	(c) Compensation	employee benefit plans	(e) Expense account, other allowances

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

' JAMES & BETTY JACOBS FAMILY		
Form 990-PF (2016) CHARITABLE TRUST C/O JEFF JACOBS	01-0511	399 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundati Paid Employees, and Contractors (continued)	on Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, enter "	'NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
	-	_
Total number of others receiving over \$50,000 for professional services	<u> </u>	0
Part IX-A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistic number of organizations and other beneficiaries served, conferences convened, research papers productions.		Expenses
1 N/A		

Part IX-B | Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2. Amount N/A All other program-related investments. See instructions. ▶ Total. Add lines 1 through 3

P	Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations	ndation	ıs, see ınstructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
а	Average monthly fair market value of securities	1a	0.
b	Average of monthly cash balances	1b	382,745.
C	Fair market value of all other assets	10	3,713,465.
đ	Total (add lines 1a, b, and c)	1d	4,096,210.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation) 1e 1 0 •		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	4,096,210.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	61,443.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,034,767.
6	Minimum investment return. Enter 5% of line 5	6	201,738.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations check here	id certai	n
1	Minimum investment return from Part X, line 6	1	201,738.
2a	Tax on investment income for 2016 from Part VI, line 5		
b	Income tax for 2016. (This does not include the tax from Part VI.)]	
C	Add lines 2a and 2b	2c	562.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	201,176.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	201,176.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	201,176.
P	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		104 647
	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	19 4 ,6 4 7.
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
	Suitability test (prior IRS approval required)	3a	
	Cash distribution test (attach the required schedule)	3b	104 647
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	194,647.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment	_	^
	income. Enter 1% of Part I, line 27b	5	104 647
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	194,647.
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation 4940(e) reduction of tax in those years.	qualifies	for the section

Part XIII Undistributed Income (see instructions) (b) (d) (c) Years prior to 2015 2015 2016 Corpus 1 Distributable amount for 2016 from Part XI, 201,176. line 7 Undistributed income, if any, as of the end of 2016 0 a Enter amount for 2015 only **b** Total for prior years: 0 3 Excess distributions carryover, if any, to 2016: a From 2011 **b** From 2012 120. c From 2013 24,771. dFrom 2014 e From 2015 24,891 f Total of lines 3a through e 4 Qualifying distributions for 2016 from 194,647 Part XII, line 4: ►\$ 0 a Applied to 2015, but not more than line 2a b Applied to undistributed income of prior 0. years (Election required - see instructions) c Treated as distributions out of corpus 0 (Election required - see instructions) 194,647. d Applied to 2016 distributable amount 0. e Remaining amount distributed out of corpus 6,529. Excess distributions carryover applied to 2016 must be shown in column (a)) 6 Enter the net total of each column as indicated below: 18,362. & Corpus Add lines 3f, 4c, and 4e Subtract line 5 b Prior years' undistributed income. Subtract 0. line 4b from line 2b c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously 0. assessed d Subtract line 6c from line 6b. Taxable 0 amount - see instructions e Undistributed income for 2015. Subtract line 0 4a from line 2a. Taxable amount - see instr. f Undistributed income for 2016. Subtract lines 4d and 5 from line 1. This amount must 0. be distributed in 2017 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election 0. may be required - see instructions) 8 Excess distributions carryover from 2011 not applied on line 5 or line 7 0 9 Excess distributions carryover to 2017. 18,362. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2012 b Excess from 2013 18,362. c Excess from 2014 d Excess from 2015

e Excess from 2016

C/O JEFF JACOBS 01-0511399 CHARITABLE TRUST Form 990-PF (2016) Page 10 Part XIV | Private Operating Foundations (see instructions and Part VII-A, question 9) N/A 1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2016, enter the date of the ruling 4942(j)(3) or 4942(1)(5) b Check box to indicate whether the foundation is a private operating foundation described in section 2 a Enter the lesser of the adjusted net Tax year Prior 3 years (c) 2014 (d) 2013 (e) Total (a) 2016 (b) 2015 income from Part I or the minimum investment return from Part X for each year listed **b** 85% of line 2a c Qualifying distributions from Part XII, line 4 for each year listed d Amounts included in line 2c not used directly for active conduct of exempt activities e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c Complete 3a, b, or c for the alternative test relied upon: a "Assets" alternative test - enter: (1) Value of all assets (2) Value of assets qualifying under section 4942(j)(3)(B)(i) b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year c "Support" alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) (3) Largest amount of support from an exempt organization (4) Gross investment income Part XV | Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.) 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. NONE Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here \triangleright 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; SEE STATEMENT 10 b The form in which applications should be submitted and information and materials they should include: c Any submission deadlines: d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

01-0511399 Page 11 CHARITABLE TRUST C/O JEFF JACOBS Form 990-PF (2016) Part XV | Supplementary Information (continued) Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, show any relationship to any foundation manager or substantial contributor Purpose of grant or contribution Foundation Amount status of Name and address (home or business) recipient a Paid during the year NONE PUBLIC SCHOLARSHIP ALL SAINTS SCHOOL 4,500. DONATION BANGOR SYMPHONY ORCHESTRA NONE PUBLIC 1,000. NONE PUBLIC DONATION BATH MUNICIPAL BAND 1,000. NONE PUBLIC DONATION BOWDOIN 2,500. BREWER HIGH SCHOOL NONE PUBLIC DONATION 2,000. SEE CONTINUATION SHEET(S) ▶ 3a 148,900. Total b Approved for future payment NONE

٥.

▶ 3b

Total

Enter gross amounts unless otherwise i	ndicated	Unrelated	ousiness income	Excluded	by section 512, 513, or 514	(e)
The gross amounts amoss otherwise .	naidatoa.	(a) Business	(b)	(C) Exclu-	(d)	Related or exempt
1 Program service revenue;		Business code	Amount	sion	Amount	function income
-						
<u> </u>				+		
b		 		+-+		
<u> </u>		ļ		++		
a		ļ		+		
e				+		
f			<u> </u>			
g Fees and contracts from government		 				
2 Membership dues and assessments						
3 Interest on savings and temporary c	ash					
investments						1,501
Dividends and interest from securities	es					1,501 100,093
Net rental income or (loss) from real	estate:					
a Debt-financed property						
b Not debt-financed property				 		
Net rental income or (loss) from pers	sonal			++-		
property		1		}	1	
7 Other investment income		 		+ +		
B Gain or (loss) from sales of assets o	thar			- 		
· -	uiei					<27,753
than inventory	.aaba		·			(21,133
Net income or (loss) from special ev						
O Gross profit or (loss) from sales of I	nventory	-		+		
1 Other revenue.		1 1				
<u>a</u>			_			
b		—				··· <u>······</u>
c		L	· · · · · · · · · · · · · · · · · · ·			
d						
e				_		
2 Subtotal. Add columns (b), (d), and		<u> </u>	0		0.	73,841 73,841
3 Total. Add line 12, columns (b), (d),	and (e)				13	73,841
See worksheet in line 13 instructions to	verify calculations.)					
Part XVI-B Relationshi	p of Activities t	o the Accor	nnlishment of l	Evemnt B	urnosas	·
rait XVI-B Helationshi	p of Activities t					
				-A contribute	d importantly to the accom	plishment of
▼ the foundation's exemp						
EARNINGS FROM						
TO EXEMPT OR					FOR CHARITA	ABLE,
SCIENTIFIC,	LITERARY OF	R EDUCAT	IONAL PURP	OSES.		
	· · · · · · · · · · · · · · · · · · ·					
-						-
-					··	
						
- 				 -		
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	<u>_</u>				· 	
						
						
		- <u>-</u>	 			
			····			
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Form 990-PF (2016)

01-0511399 Page 13

16) CHARITABLE TRUST C/O JEFF JACOBS 01-0511399
Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

1	Did the or	ganization directly or indir	ectly engage in any of the	followin	g with any other organization	n described in secti	on 501(c) of		es	No
	the Code (other than section 501(c)	(3) organizations) or in se	ction 52	7, relating to political organi	zations?		ΙF		
а	Transfers	from the reporting founda	ation to a noncharitable exe	empt org	ganızatıon of:			1 1]	
	(1) Cash							1a(1)		X
	(2) Other	assets						1a(2)		X
b	Other tran	sactions:								
	(1) Sales	of assets to a noncharital	ble exempt organization					1b(1)		<u>X</u>
	(2) Purch	nases of assets from a nor	ncharitable exempt organiz	zation				1b(2)		X
	• •	il of facilities, equipment, i	or other assets					1b(3)		<u>X</u>
		bursement arrangements						1b(4)		X
	• •	s or loan guarantees						1b(5)		X
			mbership or fundraising so					1b(6)		X
	_		iling lists, other assets, or p	•				10		X
đ					dule. Column (b) should alw				ts,	
			other assets, or services re		ed less than fair market value	e in any transaction	or snaring arrangement, si	IOW III		
(a)ı	ine no	(b) Amount involved	· · · · · · · · · · · · · · · · · · ·		e exempt organization	(d) Description	of transfers, transactions, and s	haring aga	nama	nte
(4).	1110 110	(b) Amount involved		I/A	cxcmpt organization	(u) Description	or transfers, transactions, and s	naing ana	ilgerile	
_			<u>.</u>	1/ A						
						•				
_							· · · · · · · · · · · · · · · · · · ·			
								-		
		-								
					•					
					·					
2a	Is the four	ndation directly or indirect	tly affiliated with, or related	l to, one	or more tax-exempt organiz	ations described	_	_		_
			r than section 501(c)(3)) o	r in sect	tion 527 ?		L	Yes	X	No
<u>b</u>	If "Yes," co	omplete the following sch								
		(a) Name of org	janization		(b) Type of organization	·····	(c) Description of relationsh	пр		
		N/A								
						 				
	Under	penalties of perlury. I declare	that I have examined this return	n, includir	ng accompanying schedules and :	statements, and to the	best of my knowledge			
Si					in taxpayer) is based on all inform.		has any knowledge May	the IRS di on with the	prepar	er
He	ere	Chill Cha	cols		1 4/11/17	TRUSTE		wn below (: Yes	see ins	7 I
	I	nature/of officer or trastee			Date ///	Title	<u> </u>	Tes La		J No
	1 5.9,	Print/Type preparer's na		arer's s	ignature	Date	Check if PTIN			
		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,					self- employed			
Pa	aid	STEVEN D C	ARR 🔟		a Va	4/5/11	· • i	14620	88(
Pr	eparer	Firm's name ► HAV		EY &	CURRAN LLC	11 4/11	Firm's EIN ▶ 01-02			
	se Only			~	- Julius					
	,	Firm's address ▶ 8	COMMERCE COL	URT						
			MPDEN, ME 04		-1538		Phone no. 207-94	15-56	595	
					47 to 5			rm QQA		(2016)

Part IV | Capital Gains and Losses for Tax on Investment Income (b) How acquired P - Purchase D - Donation (a) List and describe the kind(s) of property sold, e.g., real estate, (c) Date acquired (d) Date sold (mo., day, yr.) 2-story brick warehouse; or common stock, 200 shs. MLC Co. (mo., day, yr.) BY RBC CAPITAL MARKETS #317-31575 P 1a AS b AS REPORTED BY RBC CAPITAL MARKETS #317-31575 P RBC CAPITAL MARKETS #316-52225 P c AS REPORTED BY REPORTED BY RBC CAPITAL MARKETS #316-52225 P e AS REPORTED BY RBC CAPITAL MARKETS #311-78271 P CAPITAL GAINS DIVIDENDS h m п 0 (f) Depreciation allowed (g) Cost or other basis (h) Gain or (loss) (e) Gross sales price (or allowable) plus expense of sale (e) plus (f) minus (g) 2,674. 405,685. 403,011 201,221. 193,898. 7,323. b 206,282. 164,450. $\overline{<41.832.}>$ C 247,693. 243,920. 3,773. đ 600,000. 600,000. 0. е 309. 309. f g h m n 0 Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (I) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), (j) Adjusted basis (k) Excess of col. (i) but not less than "-0-") (i) F.M.V. as of 12/31/69 as of 12/31/69 over col. (j), if any * * 2,674. a b 7,323. ++ <41,832.> C 3.773.0. e <u>309.</u> f 9 ħ k m n 0 { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 } 2 Capital gain net income or (net capital loss) <27,753.> 2 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8 <39,158.>

Part XV Supplementary Information 3 Grants and Contributions Paid During the Y				
Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	status of recipient	Contribution	Amount
BROOKS PRESERVATION SOCIETY	NONE	PUBLIC	DONATION	
	NONS	- OBBIC		1,000.
BUCKSPORT BAY HEALTHY COMMUNITIES	NONE	PUBLIC	DONATION	
COALITION				1,000
COASTAL CARE TEAM	NONE	PUBLIC	DONATION	
				5,000
				}
COMPASS PROJECT	NONE	PUBLIC	DONATION	
				1,000
DEER ISLE SUNSET CONGRETIONAL CHURCH	NONE	PUBLIC	DONATION	
				2,500
DOWNEAST RAIL HERITAGE PRESERVATION	NONE	PUBLIC	DONATION]
TRUST				2,500
FRIENDS OF HOLBROOK ISLAND SANCTUARY	NONE	PUBLIC	DONATION	
	<u> </u>		+	5,000
HABITAT FOR HUMANITY	NONE	PUBLIC	DONATION	
			 	5,000
HONOR FLIGHTS OF MAINE	NONE	PUBLIC	DONATION	
 		<u> </u>	ļ	1,400
HYDE SCHOOL	NONE	PUBLIC	DONATION	
				1,000
Total from continuation sheets				137,900

3 . Grants and Contributions Paid During the	Year (Continuation)			
Recipient	If recipient is an individual, show any relationship to	Foundation	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	status of recipient	Contribution	,
ISLAND COMMUNITY CENTER	NONE	PUBLIC	DONATION	2 000
				2,000
TC: AND MIDCING HOME	NONE	PUBLIC	DONATION	
ISLAND NURSING HOME	NONE		DONATION	5,000
MAINE ISLAND TRAILS ASSOCIATION	NONE	PUBLIC	DONATION	1,000
<u> </u>				
MAINE PUBLIC BROADCASTING NETWORK	NONE	PUBLIC	DONATION	
				5,000
MCHT	NONE	PUBLIC	DONATION	2,000
MIDCOAST ME COMMUNITY ACTION	NONE	PUBLIC	DONATION	
				1,500
NEW ENGLAND STEAM CO.	NONE	PUBLIC	DONATION	7,000
NNE SECTION AM SOC NAVAL ENGRS	NONE	PUBLIC	DONATION	1,500
	 			1,300
NORTHPORT FOOD PANTRY	NONE	PUBLIC	DONATION	
				1,000
		:		
PRESENCE RADIO STATION	NONE	PUBLIC	DONATION	2,000
Total from continuation sheets				

Part XV' Supplementary Information		JEFF JACO	BS 01-05	
${\bf 3}$ 、Grants and Contributions Paid During the Y				
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	Amount
RED CROSS	NONE	PUBLIC	DONATION	
				1,000
SARAH'S HOUSE	NONE	PUBLIC	DONATION	5,000
SARAH'S HOUSE	NONE	PUBLIC	DONATION	6,000.
ST PAULS APOSTLE PARISH	NONE	PUBLIC	DONATION	3,000
ST PAULS APOSTLE PARISH	NONE	PUBLIC	DONATION	5,000
ST PAULS APOSTLE PARISH	NONE	PUBLIC	DONATION	5,000
THE APPRENCTICESHOP	NONE	PUBLIC	DONATION	1,000
TREE OF LIFE	NONE	PUBLIC	DONATION	2,000
TREE OF LIFE	NONE	PUBLIC	DONATION	5,000
TRI COUNTY LITERACY VOLUNTEERS	NONE	PUBLIC	DONATION	7,000
Total from continuation sheets		·		

Part XV Supplementary Informati				
3 Grants and Contributions Paid During the			<u></u>	
Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	recipient		
UNITED MID-COAST CHARITIES	NONE	PUBLIC	DONATION	4,000.
UNIVERSITY OF MAINE MEN'S HOCKEY	NONE	PUBLIC	DONATION	0.500
				2,500.
FRIENDS OF SEGUIN	NONE	PUBLIC	DONATION	
			 	500.
PATTEN FREE LIBRARY	NONE	PUBLIC	DONATION	1,000.
HOLDEN LAND TRUST	NONE	PUBLIC	DONATION	5,000.
BUCKSPORT MEMORIAL LIBRARY	NONE	PUBLIC	DONATION	5,000.
				3,000.
MMA T SMITH SCHOOL	none	PUBLIC	DONATION	
	_			1,000.
PANTA TO A COLLEGE OF THE COLUMN TO COMMUNICATION	VONT	DUDI TO	DOMATION	
FAMILIES & CHILDREN TOGETHER	NONE	PUBLIC	DONATION	5,000.
BUCKSPORT FIREWOOD	NONE	PUBLIC	DONATION	500.
DOWNEAST CHAPTER MAINE AUDUBON SOCIETY	NONE	PUBLIC	DONATION	2,000.
Total from continuation sheets				

3 .Grants and Contributions Paid During the Y	ear (Continuation)			
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient	Contribution	
SHEPHERDS GODPARENT HOME	NONE	PUBLIC	DONATION	
				5,000
PRINCE OF PEACE PARISH	NONE	PUBLIC	DONATION	7,000
LONGVIEW AWARD	NONE	PUBLIC	DONATION	
JUNGVIEW AWARD	NONE	FORDIC	DONATION	2,000
BUCKSPORT MEMORIAL LIBRARY	NONE	PUBLIC	DONATION	
				2,000
FRIENDS OF HOLBROOK ISLAND SANCTUARY	NONE	PUBLIC	DONATION	1,000
				, , , , , , , , , , , , , , , , , , ,
NULL ENGLAND GERMA CO	10072	DUDY TO	DOMARTON	
NEW ENGLAND STEAM CO.	NONE	PUBLIC	DONATION	1,000
······································				
).
				1
Total from continuation sheets			<u> </u>	

FORM 990-PF INTERE	ST ON SAVIN	GS AND TEM	PORARY	CASH IN	VESTMENTS	STA	ATEMENT	1
SOURCE		REVE			(B) VESTMENT COME		(C) ADJUSTED NET INCOME	
RBC WEALTH MANAGEME RBC WEALTH MANAGEME RBC WEALTH MANAGEME	NT - 52225	:	150. 1. 1,350.		150. 1. 1,350.		1,35	50. 1. 50.
TOTAL TO PART I, LI	NE 3		1,501.		1,501.		1,50	01.
FORM 990-PF	DIVIDENDS	AND INTER	EST FRO	OM SECUR	ITIES	ST	ATEMENT	2
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	RI	(A) EVENUE R BOOKS	(B) NET INVES MENT INCO		(C) ADJUSTE NET INCO	
RBC WEALTH MANAGEMENT - 31575 RBC WEALTH	43,862.	30	9.	43,553.	43,35	8.	43,55	53.
MANAGEMENT - 52225 RBC WEALTH MANAGEMENT - 78271	5,769. 94,003.		o. o.	5,769. 94,003.	5,76 1,44		5,76 94,00	
RBC WEALTH MANAGEMENT - 78271 - BOND PREMIUM	<43,232.	>	O. ·	<43,232.	>	0.	<43,23	32.>
TO PART I, LINE 4	100,402.	30	9.	100,093.	50,57	5.	100,09	93.
FORM 990-PF		ACCOUNTI	NG FEE:	<u> </u>		ST	ATEMENT	3
DESCRIPTION		(A) EXPENSES PER BOOKS	NET I	B) NVEST- INCOME	(C) ADJUSTED NET INCOM		(D) CHARITAI PURPOSI	
ACCOUNTING FEES		1,200.	 -	0.		0.	1,20	00.
TO FORM 990-PF, PG	1, LN 16B	1,200.		0.		0.	1,20	00.

FORM 990-PF (THER PROFES	SIONAL FEES	STATEMENT 4		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
INVESTMENT FEES ADMINISTRATIVE FEES	19,376. 4,000.	19,376.	19,376. 0.	4,000.	
TO FORM 990-PF, PG 1, LN 16C	23,376.	19,376.	19,376.		
FORM 990-PF	TAXES		STATEMENT 5		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
EXCISE TAX FOREIGN TAX PAID	3,145. 1,471.	3,145. 1,471.	3,145. 1,471.	0.	
TO FORM 990-PF, PG 1, LN 18	4,616.	4,616.	4,616.	0.	
FORM 990-PF	OTHER EXPENSES		STATEMENT 6		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
POSTAGE & OFFICE EXPENSES	47.	0.	0.	47.	
TO FORM 990-PF, PG 1, LN 23	47.	0.	0.	47.	

FORM 990-PF U.S. AND STATE	/CITY GOV	ERNMENT	OBLIGATIONS	STATEMENT	7
DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET	r
GOVERNMENT BONDS		<u> </u>	1,191,409.	1,214,167	
TOTAL U.S. GOVERNMENT OBLIGATIONS		-			
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			1,191,409.	1,214,167.	
TOTAL TO FORM 990-PF, PART II, LI	=	1,191,409.	1,214,167.		
FORM 990-PF C	ORPORATE	STOCK		STATEMENT	8
DESCRIPTION			BOOK VALUE	FAIR MARKET	r
EQUITIES		-	2,191,365.	2,290,00	65.
TOTAL TO FORM 990-PF, PART II, LINE 10B			2,191,365. 2,290,		55. ===
FORM 990-PF C	ORPORATE	BONDS		STATEMENT	9
DESCRIPTION			BOOK VALUE	FAIR MARKE	r
CORPORATE BONDS		-	26,312.	26,3	42.
TOTAL TO FORM 990-PF, PART II, LINE 10C					

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION STATEMENT 10 PART XV, LINES 2A THROUGH 2D

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

JEFF JACOBS 300 HOUGHTON POND RD. WEST BATH, ME 04530

TELEPHONE NUMBER

207-449-1250

FORM AND CONTENT OF APPLICATIONS

N/A

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

AWARDS WILL BE LIMITED TO STATES, TERRITORIES, OR POSSESSIONS OF THE U.S. ANY POLITICAL SUBDIVISION OF ANY OF THE FOREGOING, OR TO THE U.S. OR THE DISTRICT OF COLUMBIA. IT SHALL ALSO BE LIMITED TO CHARITABLE PURPOSES WHICH SHALL INCLUDE ONLY RELIGIOUS, CHARITABLE, SCIENTIFIC, LITERARY, OR EDUCATIONAL PURPOSES WITHIN THE MEANING OF IRC SECTION 501 (C) (3).