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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.
▶ Information about Form 990-PF and its instructions is at *www.irs.gov/form990pf*.

OMB No 1545-0052

2016

Open to Public Inspection

For calendar year 2016, or tax year beginning 01-01-2016 , and ending 12-31-2016

Name of foundation
MASSACHUSETTS CHARITABLE MECHANIC
ASSOCIATION

A Employer identification number
04-2023566

Number and street (or P O box number if mail is not delivered to street address) Room/suite
353 SOUTHERN ARTERY

B Telephone number (see instructions)
(617) 479-1795

City or town, state or province, country, and ZIP or foreign postal code
QUINCY, MA 021692210

C If exemption application is pending, check here ▶ ☐

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

D 1. Foreign organizations, check here ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

H Check type of organization ☑ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

I Fair market value of all assets at end of year *(from Part II, col (c), line 16)*▶$ 5,170,412

J Accounting method ☐ Cash ☑ Accrual
☐ Other (specify)
(Part I, column (d) must be on cash basis)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

Part 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))*

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	417,000			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	1	1		
	4	Dividends and interest from securities	56,192	56,192		
	5a	Gross rents	1,500	1,500		
	b	Net rental income or (loss) -23,643				
	6a	Net gain or (loss) from sale of assets not on line 10	58,970			
	b	Gross sales price for all assets on line 6a 1,309,794				
	7	Capital gain net income (from Part IV, line 2)		58,970		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)	11,610			
	12	**Total.** Add lines 1 through 11	545,273	116,663		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc				
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits	18,000	900		3,600
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	20,517	10,259		
	c	Other professional fees (attach schedule)	25,151	25,151		
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	524	524		
	19	Depreciation (attach schedule) and depletion	25,143	25,143		
	20	Occupancy	16,117			9,670
	21	Travel, conferences, and meetings				
	22	Printing and publications	7,083	1,062		4,250
	23	Other expenses (attach schedule)	65,408	3,286		13,147
	24	**Total operating and administrative expenses.** Add lines 13 through 23	177,943	66,325		30,667
	25	Contributions, gifts, grants paid	238,285			238,285
	26	**Total expenses and disbursements.** Add lines 24 and 25	416,228	66,325		268,952
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	129,045			
	b	**Net investment income** (if negative, enter -0-)		50,338		
	c	**Adjusted net income**(if negative, enter -0-)				

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	143,706	382,851	382,851
	2	Savings and temporary cash investments	130,370	30,135	30,135
	3	Accounts receivable ▶ 13,875			
		Less allowance for doubtful accounts ▶	8,536	13,875	13,875
	4	Pledges receivable ▶			
		Less allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶			
		Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	10,975	1,500	1,500
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	2,065,413	2,440,780	3,032,192
	c	Investments—corporate bonds (attach schedule)	1,516,167	1,102,072	1,139,085
	11	Investments—land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ 570,774			
		Less accumulated depreciation (attach schedule) ▶ 369,765	190,998	201,009	570,774
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	4,066,165	4,172,222	5,170,412
Liabilities	17	Accounts payable and accrued expenses	5,235	1,784	
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities**(add lines 17 through 22)	5,235	1,784	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ ☑ and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted	3,563,822	3,695,395	
	25	Temporarily restricted			
	26	Permanently restricted	497,108	475,043	
		Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	**Total net assets or fund balances** (see instructions)	4,060,930	4,170,438	
	31	**Total liabilities and net assets/fund balances** (see instructions)	4,066,165	4,172,222	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	4,060,930
2	Enter amount from Part I, line 27a	2	129,045
3	Other increases not included in line 2 (itemize) ▶	3	13,488
4	Add lines 1, 2, and 3	4	4,203,463
5	Decreases not included in line 2 (itemize) ▶	5	33,025
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	4,170,438

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	See Additional Data Table			
b				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	See Additional Data Table			
b				
c				
d				
e				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a	See Additional Data Table			
b				
c				
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	58,970
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☑ No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2015	195,551	4,708,700	0 041530
2014	204,807	4,707,839	0 043503
2013	167,685	4,372,006	0 038354
2012	180,070	4,048,385	0 044479
2011	188,878	4,050,803	0 046627

2	**Total** of line 1, column (d)	2	0 214493
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 042899
4	Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	4,758,326
5	Multiply line 4 by line 3	5	204,127
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	503
7	Add lines 5 and 6	7	204,630
8	Enter qualifying distributions from Part XII, line 4	8	268,952

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions

Part VI **Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions)**

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1				
	Date of ruling or determination letter ______ **(attach copy of letter if necessary–see instructions)**				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☑ and enter 1% of Part I, line 27b			1	503
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)				
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			2	
3	Add lines 1 and 2.			3	503
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			4	
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-			5	503
6	Credits/Payments				
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a			
b	Exempt foreign organizations—tax withheld at source	6b			
c	Tax paid with application for extension of time to file (Form 8868)	6c	524		
d	Backup withholding erroneously withheld	6d			
7	Total credits and payments Add lines 6a through 6d.			7	524
8	Enter any **penalty** for underpayment of estimated tax Check here ☑ if Form 2220 is attached			8	15
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	6
11	Enter the amount of line 10 to be **Credited to 2017 estimated tax** ▶ 6 **Refunded** ▶			11	

Part VII-A **Statements Regarding Activities**

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?.	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities*			
c	Did the foundation file **Form 1120-POL** for this year?.	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ ______ **(2)** On foundation managers ▶ $ ______			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ______			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities*	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?.	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?.	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ MA			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		No

Part VII-A Statements Regarding Activities (continued)

			Yes	No
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 ▶THE ORGANIZATION Telephone no ▶(617) 479-1795

Located at ▶353 SOUTHERN ARTERY QUINCY MA ZIP+4 ▶021692210

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 |

			Yes	No
16	At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		No
	See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶			

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly)				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?.	☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☑ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☑ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?.	☐ Yes ☑ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days).	☐ Yes ☑ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?		1b		
	Organizations relying on a current notice regarding disaster assistance check here. ▶	☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016?.		1c		
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))				
a	At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016?. If "Yes," list the years ▶ 20____, 20____, 20____, 20____	☐ Yes ☑ No			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions)		2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?.	☐ Yes ☑ No			
b	If "Yes," did it have excess business holdings in 2016 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 2016).*		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 2016?		4b		No

Part VII-B **Statements Regarding Activities for Which Form 4720 May Be Required** (Continued)

5a	During the year did the foundation pay or incur any amount to				
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☑ No			
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☑ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☑ No			
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions)	☐ Yes ☑ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☑ No			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)?		**5b**		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐				
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	☐ Yes ☐ No			
	If "Yes," attach the statement required by Regulations section 53 4945–5(d)				
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☑ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		**6b**		No
	If "Yes" to 6b, file Form 8870				
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☑ No			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		**7b**		

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

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

(a) Name and address	Title, and average hours per week **(b)** devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
See Additional Data Table				

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

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

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

Part VIII **Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)***

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than $50,000	**(b)** Type of service	**(c)** Compensation
NONE		

Total number of others receiving over $50,000 for professional services. . . . . ▶	

Part IX-A **Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 DIRECT CONTRIBUTIONS TO NONPROFIT ORGANIZATIONS WHO PROMOTE THE TRADES OR TRAIN TRADESMAN, INCLUDING THOSE WITH PHYSICAL AND DEVELOPMENTAL DISABILITIES FOR EMPLOYMENT	235,285
2 RELIEF DISTRIBUTIONS	3,000
3	
4	

Part IX-B **Summary of Program-Related Investments** (see instructions)

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

Part X Minimum Investment Return (All domestic foundations must complete this part Foreign foundations,see instructions)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	4,104,916
b	Average of monthly cash balances.	1b	234,079
c	Fair market value of all other assets (see instructions).	1c	491,793
d	**Total** (add lines 1a, b, and c).	1d	4,830,788
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). 1e		
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	4,830,788
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	72,462
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	4,758,326
6	**Minimum investment return.** Enter 5% of line 5.	6	237,916

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ▶ ☐ and do not complete this part)

1	Minimum investment return from Part X, line 6.			1	237,916
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	503		
b	Income tax for 2016 (This does not include the tax from Part VI).	2b			
c	Add lines 2a and 2b.			2c	503
3	Distributable amount before adjustments Subtract line 2c from line 1.			3	237,413
4	Recoveries of amounts treated as qualifying distributions.			4	
5	Add lines 3 and 4.			5	237,413
6	Deduction from distributable amount (see instructions).			6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.			7	237,413

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	268,952
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		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	268,952
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	503
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4.	6	268,449

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI, line 7				237,413
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only.			178,086	
b Total for prior years 20___ , 20___ , 20___				
3 Excess distributions carryover, if any, to 2016				
a From 2011.				
b From 2012.				
c From 2013.				
d From 2014.				
e From 2015.				
f **Total** of lines 3a through e.				
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ $ 268,952				
a Applied to 2015, but not more than line 2a			178,086	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2016 distributable amount.				90,866
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2016 *(If an amount appears in column (d), the same amount must be shown in column (a))*				
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract 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 assessed.				
d Subtract line 6c from line 6b Taxable amount —see instructions				
e Undistributed income for 2015 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017				146,547
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)				
8 Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions) . . .				
9 **Excess distributions carryover to 2017.** Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2012. . . .				
b Excess from 2013. . . .				
c Excess from 2014. . . .				
d Excess from 2015. . . .				
e Excess from 2016. . . .				

Part XIV **Private Operating Foundations** (see instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2016, enter the date of the ruling. . . . . ▶

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

	Tax year	Prior 3 years			(e) Total
	(a) 2016	**(b)** 2015	**(c)** 2014	**(d)** 2013	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test—enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV **Supplementary Information (Complete this part only if the organization had $5,000 or more in assets at any time during the year—see instructions.)**

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000) (See section 507(d)(2))

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

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

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

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed

KURT E HANSON
353 SOUTHERN ARTERY
QUINCY, MA 02169
(617) 479-1795

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

IN WRITING, NO FORMAL APPLICATION IS REQUIRED

c Any submission deadlines

NONE

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

NONE

Part XV Supplementary Information (continued)

3 Grants 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	Amount
a *Paid during the year* See Additional Data Table				
Total . . . . ▶ **3a**				238,285
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments			14	1	
4 Dividends and interest from securities. . . .			14	56,192	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.			16	-23,643	
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	55,140	3,830
9 Net income or (loss) from special events			1	-35,934	
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a CLASS ACTION PROCEEDS					4,050
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e). .				51,756	7,880

13 Total. Add line 12, columns (b), (d), and (e). **13** 59,636

(See worksheet in line 13 instructions to verify calculations)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501 (c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.	1a(1)		No
(2) Other assets.	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
(3) Rental of facilities, equipment, or other assets.	1b(3)		No
(4) Reimbursement arrangements.	1b(4)		No
(5) Loans or loan guarantees.	1b(5)		No
(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No

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

(a) Line No	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

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

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

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

******	2017-06-19	******
Signature of officer or trustee	Date	Title

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶ ☐	PTIN
JOSEPH B MORIARTY CPA		2017-06-27		P00043600
Firm's name ▶ KING MCNAMARA MORIARTY LLP				Firm's EIN ▶04-2686846
Firm's address ▶ 473 WASHINGTON STREET NORWOOD, MA 020622330				Phone no (781) 769-6300

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
20 577 SH SSGA INTERNATIONAL STOCK	P		2016-01-15
4 SH SPDR S&P INTL SMALL CAP	P		2016-04-20
256 SH IPATH BLOOMBERG COMMODITY	P		2016-08-09
70 360 SH S&P 500 COMMON TRUST	P		2016-08-05
3,158 540 SH PASSIVE BOND MKT	P		2016-12-19
3,385 641 SH SSGA INTERNATIONAL STOC	P		2016-01-15
15,172 834 SH SSGA EMERGING MARKETS	P		2016-04-15
41 SH IPATH BLOOMBERG COMMODITY	P		2016-08-09
452 878 SH S&P 500 COMMON TRUST	P		2016-08-05
371 006 SH PASSIVE BOND MKT	P		2016-12-19

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
193		199	-6
116		141	-25
5,848		6,368	-520
7,333		3,718	3,615
47,803		43,412	4,391
31,687		30,857	830
107,727		200,034	-92,307
939		1,020	-81
47,203		23,931	23,272
5,615		5,236	379

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-6
			-25
			-520
			3,615
			4,391
			830
			-92,307
			-81
			23,272
			379

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
402 051 SH SSGA INTERNATIONAL STOCK	P		2016-01-15
1,844 743 SH SSGA EMERGING MARKETS	P		2016-04-15
21 SH SPDR BLOOMBERG BARCLAYS	P		2016-08-09
355 354 SH TREASURY INFLATION PROTEC	P		2016-08-05
38 896 SH PASSIVE BOND MKT	P		2016-12-19
53 878 SH PASSIVE BOND MKT	P		2016-01-19
175 949 SH SSGA EMERGING MARKETS FUN	P		2016-04-15
239 SH SPDR DOW JONES REIT	P		2016-08-09
64 883 SH TREASURY INFLATION PROTECT	P		2016-08-05
391 SH SPDR BLOOMBERG BARCLAYS	P		2016-02-18

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
3,763		3,570	193
13,098		22,962	-9,864
733		719	14
5,098		4,905	193
589		542	47
808		702	106
1,249		2,191	-942
24,253		16,925	7,328
931		896	35
13,117		13,410	-293

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			193
			-9,864
			14
			193
			47
			106
			-942
			7,328
			35
			-293

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
61 331 SH SSGA INTERNATIONAL STOCK	P		2016-04-15
34 SH SPDR DOW JONES REIT	P		2016-08-09
9 921 SH SSGA ENHANCED SMALL CAP	P		2016-08-22
4,957 913 SSGA INTERNATIONAL STOCK	P		2016-02-12
5,276 420 SH SSGA INTERNATIONAL STOC	P		2016-04-15
46 SH SPDR S&P INTL SMALL CAP	P		2016-08-09
26 921 SH SSGA INTERNATIONAL STOCK	P		2016-08-22
60 266 SSGA INTERNATIONAL STOCK	P		2016-02-12
619 242 SH SSGA INTERNATIONAL STOCK	P		2016-04-15
310 SH SPDR S&P INTL SMALL CAP	P		2016-08-09

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
625		543	82
3,448		2,408	1,040
138		111	27
44,671		48,034	-3,363
53,767		49,159	4,608
1,397		1,623	-226
275		233	42
543		569	-26
6,310		5,728	582
9,409		10,935	-1,526

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			82
			1,040
			27
			-3,363
			4,608
			-226
			42
			-26
			582
			-1,526

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
4,534 522 SH SSGA INTERNATIONAL STOC	P		2016-10-12
589 606 SSGA INTERNATIONAL STOCK	P		2016-02-12
38 655 SH S&P 500 COMMON TRUST	P		2016-04-19
52 SH SPDR S&P MIDCAP 400 ETF	P		2016-08-09
45 135 SH SSGA INTERNATIONAL STOCK	P		2016-10-12
3,669 622 PASSIVE BOND MKT	P		2016-02-16
337 979 SH S&P 500 COMMON TRUST	P		2016-04-19
4 SH SPDR S&P MIDCAP 400 ETF	P		2016-08-09
523 561 SSGA INTERNATIONAL STOCK SEL	P		2016-10-12
422 107 PASSIVE BOND MKT	P		2016-02-16

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
45,481		39,147	6,334
5,312		5,712	-400
3,853		2,043	1,810
14,649		8,516	6,133
453		395	58
55,460		47,836	7,624
33,691		17,859	15,832
1,127		655	472
5,251		4,612	639
6,379		5,502	877

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			6,334
			-400
			1,810
			6,133
			58
			7,624
			15,832
			472
			639
			877

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
3 965 SH S&P 500 COMMON TRUST	P		2016-04-19
160 647 SH SSGA ENHANCED SMALL CAP	P		2016-08-04
338 SH SPDR DOW JONES REIT	P		2016-11-16
92 020 TREASURY INFLATION PROTECTED	P		2016-02-16
1,115 SH SPDR S&P INTL SMALL	P		2016-07-01
486 930 SH SSGA ENHANCED SMALL CAP	P		2016-08-04
4 SH SPDR DOW JONES REIT	P		2016-11-16
765 168 TREASURY INFLATION PROTECTED	P		2016-02-16
14 SH SPDR S&P INTL SMALL CAP	P		2016-07-01
550 676 SH SSGA INTERNATIONAL STOCK	P		2016-08-04

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
395		210	185
2,198		1,791	407
30,051		23,936	6,115
1,257		1,270	-13
31,486		39,330	-7,844
6,661		5,429	1,232
356		283	73
10,450		10,563	-113
395		494	-99
5,507		4,920	587

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			185
			407
			6,115
			-13
			-7,844
			1,232
			73
			-113
			-99
			587

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
39 SH SPDR DOW JONES REIT ETF	P		2016-11-16
176 SH SPDR DOW JONES	P		2016-04-20
133 SH SPDR S&P INTL SMALL CAP	P		2016-07-01
3,763 284 SH SSGA INTERNATIONAL STOC	P		2016-08-04
28,121 696 SH PASSIVE BOND MKT	P		2016-11-14
2 SH SPDR DOW JONES REIT	P		2016-04-20
120 999 SH ABERDEEN EMERGING MARKETS	P		2016-08-04
429 438 SH PASSIVE BOND MARKET	P		2016-08-05
355 716 SH PASSIVE BOND MKT	P		2016-11-14
20 SH SPDR DOW JONES REIT	P		2016-04-20

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
3,467		2,762	705
16,647		12,464	4,183
3,756		4,691	-935
37,633		33,953	3,680
430,382		376,064	54,318
189		142	47
1,621		1,519	102
6,727		5,598	1,129
5,444		4,741	703
1,892		1,416	476

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			705
			4,183
			-935
			3,680
			54,318
			47
			102
			1,129
			703
			476

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
817 236 SH ABERDEEN EMERGING MARKETS	P		2016-08-04
2,414 464 SH PASSIVE BOND MKT	P		2016-08-05
3,289 111 SH PASSIVE BOND MKT	P		2016-11-14

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
10,951		10,256	695
37,820		31,474	6,346
50,337		44,160	6,177

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			695
			6,346
			6,177

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

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
MARTIN F JOYCE 218 ATLANTIC AVENUE QUINCY, MA 02171	SECRETARY 000 00	0	0	0
PETER J LEMONIAS 353 SOUTHERN ARTERY QUINCY, MA 02169	VICE PRESIDE 000 00	0	0	0
ARTHUR J ANTHONY 262 SANDY POND ROAD LINCOLN, MA 01773	PRESIDENT 000 00	0	0	0
KURT E HANSON 67 BRIDLE PATH FRANKLIN, MA 02038	TREASURER 000 00	0	0	0
FREDERICK ARROWSMITH 3 PINE STREET KINGSTON, MA 02364	TRUSTEE 000 00	0	0	0
JOSEPH F BELLOMO 8 HOLLIS STREET NEWTON, MA 02458	TRUSTEE 000 00	0	0	0
THOMAS CROWDIS III 30 KIRK CIRCLE PLYMOUTH, MA 023602372	TRUSTEE 000 00	0	0	0
HAROLD E FLIGHT 146 OLD WASHINGTON ST PEMBROKE, MA 02359	TRUSTEE 000 00	0	0	0
RICHARD RYAN 60 WING BOULEVARD WEST EAST SANDWICH, MA 02537	TRUSTEE 000 00	0	0	0
RUSSELL JOHNSON 50 KENT STREET NEWBURYPORT, MA 019502355	TRUSTEE 000 00	0	0	0
PERRY PRATT 48 PLEASANT STREET MARBLEHEAD, MA 01945	TRUSTEE 000 00	0	0	0
JOHN J LORDAN 12 HATCH ROAD MEDFORD, MA 02155	TRUSTEE 000 00	0	0	0
JOHN P MORIARTY 142 MARRETT ROAD LEXINGTON, MA 02421	TRUSTEE 000 00	0	0	0
WILLIAM H SCOTT PO BOX 426 ONSET, MA 02558	TRUSTEE 000 00	0	0	0
PAUL LOHNES 353 SOUTHERN ARTERY QUINCY, MA 02169	TRUSTEE 000 00	0	0	0
JOSEPH R VALANTE 16 IRVING ROAD RANDOLPH, MA 02368	TRUSTEE 000 00	0	0	0
STEPHEN STICKNEY 8 DONNA ROAD ANDOVER, MA 01810	TRUSTEE 000 00	0	0	0

Form 990PF Part XV Line 3 - Grants 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	Amount
a *Paid during the year*				
BOSTON CASA INC 85 MERRIMAC ST 401 BOSTON, MA 02114			TRADE RELATED EQUIPMENT AND SUPPORT	7,105
BOSTON HIGASHI SCHOOL 800 N MAIN ST RANDOLPH, MA 02368			TRADE RELATED EQUIPMENT AND SUPPORT	3,320
BRIDGE CENTER 470 PINE STREET BRIDGEWATER, MA 02324			RELATED TRADE EQUIPMENT AND SUPPORT	4,642
CARDINAL CUSHING CENTERS 405 WASHINGTON ST HANOVER, MA 02339			TRADE RELATED EQUIPMENT AND SUPPORT	14,235
CHALLENGE UNLIMITED INC 450 LOWELL ST ANDOVER, MA 01810			TRADE RELATED EQUIPMENT AND SUPPORT	11,224
CHILDREN'S CENTER FOR COMMUNICATION 6 ECHO AVE BEVERLY, MA 01915			TRADE RELATED EQUIPMENT AND SUPPORT	3,999
CROSSROADS 119 MYRTLE ST DUXBURY, MA 02332			TRADE RELATED EQUIPMENT AND SUPPORT	47,000
HOME FOR LITTLE WANDERERS 10 GUEST ST BOSTON, MA 02135			TRADE RELATED EQUIPMENT AND SUPPORT	5,205
IVY STREET SCHOOL 200 IVY ST BROOKLINE, MA 02446			TRADE RELATED EQUIPMENT AND SUPPORT	7,991
LOVELANE 40 BAKER BRIDGE RD LINCOLN, MA 01773			TRADE RELATED EQUIPMENT AND SUPPORT	8,930
MISSION OF DEEDS 6 CHAPIN AVE READING, MA 01867			TRADE RELATED EQUIPMENT AND SUPPORT	11,760
MSPCC 3815 WASHINGTON STREET 2 JAMAICA PLAIN, MA 02130			TRADE RELATED EQUIPMENT AND SUPPORT	9,888
NEW ENGLAND VILLAGE 664 SCHOOL STREET PEMBROKE, MA 02359			RELATED TRADE EQUIPMENT AND SUPPORT	5,794
NORTH BENNETT STREET SCHOOL 39 NORTH BENNET STREET BOSTON, MA 02113			TRADE RELATED EQUIPMENT AND SUPPORT	25,067
NORTH RIVER COLLABORATIVE 525 BEECH STREET ROCKLAND, MA 02370			TRADE RELATED EQUIPMENT AND SUPPORT	3,417
Total . . . . ▶ **3a**				238,285

Form 990PF Part XV Line 3 - Grants 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	Amount
a *Paid during the year*				
NORTHEAST ARC 64 HOLTEN STREET DANVERS, MA 01923			TRADE RELATED EQUIPMENT AND SUPPORT	15,943
OLD STURBRIDGE VILLAGE 1 OLD STURBRIDGE VILLAGE STURBRIDGE, MA 01566			TRADE RELATED EQUIPMENT AND SUPPORT	18,208
QUINCY POLICE PATROLMAN ASSOC 9 SHETLAN ST 11 ROXBURY, MA 02119			TRADE RELATED EQUIPMENT AND SUPPORT	400
COMM OF RELIEF DISTRIBUTI MISC QUINCY, MA 02169			FINANCIAL ASSISTANCE	3,000
SOUTH SHORE ARC 371 RIVER STREET WEYMOUTH, MA 02191			TRADE RELATED EQUIPMENT AND SUPPORT	7,052
THE CULTURAL CENTER OF CAPE COD 307 OLD MAIN ST SOUTH YARMOUTH, MA 02664			TRADE RELATED EQUIPMENT AND SUPPORT	9,443
THE ELIOT SCHOOL 24 ELIOT STREET JAMAICA PLAIN, MA 02130			TRADE RELATED EQUIPMENT AND SUPPORT	14,662
Total . . . . ▶ **3a**				238,285

TY 2016 Accounting Fees Schedule

Name: MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION

EIN: 04-2023566

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PROFESSIONAL	20,517	10,259		

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2016 Depreciation Schedule

Name: MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION

EIN: 04-2023566

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
BUILDING 1	1987-06-30	296,575	260,487	S/L	31 5000	9,415	9,415		
BUILDING IMPROVEMENTS 2	1989-06-30	78,411	65,960	S/L	31 5000	2,489	2,489		
IMPROVEMENTS- 1990 3	1990-06-30	34,214	27,616	S/L	31 5000	1,087	1,087		
CARPET	2008-05-30	5,427	5,427	S/L	5 0000				
ROOF	2009-08-24	16,500	11,825	S/L	15 0000	550	550		
DOORS	2015-02-23	6,800	3,513	S/L	15 0000	227	227		
PARKING LOT	2016-06-08	21,666		150DB	15 0000	11,375	11,375		
EQUIPMENT 4	1993-07-01	4,628	4,628	S/L	7 0000				
EQUIPMENT - 95 5	1995-07-01	1,616	1,616	S/L	7 0000				
EQUIPMENT - 96 6	1996-07-01	2,653	2,653	S/L	7 0000				
COMPUTER 7	1999-07-01	2,668	2,668	S/L	3 0000				
COMPUTER EQUIPMENT	2004-01-14	3,624	3,624	S/L	5 0000				

TY 2016 Investments Corporate Bonds Schedule

Name: MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION

EIN: 04-2023566

Name of Bond	End of Year Book Value	End of Year Fair Market Value
PASSIVE BOND MARKET - CMNP	550,017	603,409
PASSIVE HIGH YIELD	235,721	213,415
SPDR BARCLAYS		
TREASURY INFLATION PROTECTED SEC	197,261	203,745
SPDR BLOOMBERG BARCLAYS	119,073	118,516

TY 2016 Investments Corporate Stock Schedule

Name: MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION

EIN: 04-2023566

Name of Stock	End of Year Book Value	End of Year Fair Market Value
SSGA INTERNATIONAL STOCK SELECTION	486,684	528,165
SPDR S&P MIDCAP 400	187,883	266,126
SSGA EMERGING MARKET FUND		
SSGA FDS ENCHANCED SMALL CAP FD	199,356	226,182
S&P 500 CMMON TRUST	640,244	1,068,729
SPDR DOW JONES REIT ETF	219,033	258,300
SPDR S&P INTL SMALL CAP ETF FUND	177,175	159,123
IPATH BLOOMBERG COMMODITY INDEX	208,283	211,479
ABERDEEN EMERGING MARKETS	322,122	314,088

TY 2016 Land, Etc. Schedule

Name: MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION

EIN: 04-2023566

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
BUILDING	296,575	253,895	42,680	296,575
BUILDING IMPROVEMENTS	141,352	99,838	41,514	141,352
LAND IMPROVEMENTS	21,666	843	20,823	21,666
FURNITURE & FIXTURES	11,565	11,565		11,565
COMPUTER EQUIPMENT	3,624	3,624		3,624
LAND	95,992		95,992	95,992

TY 2016 Other Decreases Schedule

Name: MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION

EIN: 04-2023566

Description	Amount
BOOK/TAX INVESTMENT DIFFERENCE	33,025

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TY 2016 Other Expenses Schedule

Name: MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION

EIN: 04-2023566

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TRIENNIAL				
TRIENNIAL EXPENSE	42,794			
TRIENNIAL AUCTION EXPENSE	700			
EXPENSES				
EXPENSE OF MEETINGS	14,014	2,102		8,408
INSURANCE	5,694	854		3,416
TELEPHONE	1,787	268		1,072
OFFICE SUPPLIES AND EXPENSE	315	47		189
MA ANNUAL FILING FEE	70	10		42
MISCELLANEOUS	34	5		20

TY 2016 Other Income Schedule

Name: MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION

EIN: 04-2023566

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
TRIENNIAL	7,560		
CLASS ACTION PROCEEDS	4,050		

TY 2016 Other Increases Schedule

Name: MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION

EIN: 04-2023566

Description	Amount
BOOK/TAX DEPRECIATION DIFFERENCE	13,488

TY 2016 Other Professional Fees Schedule

Name: MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION

EIN: 04-2023566

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INV MANAGEMENT FEES	25,151	25,151		

TY 2016 Taxes Schedule

Name: MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION

EIN: 04-2023566

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CORPORATE TAXES	524	524		

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 990-PF
▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at *www irs gov/form990*

OMB No 1545-0047

2016

Name of the organization	Employer identification number
MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION	04-2023566

Organization type (check one)

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☑ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

☑ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling $5,000 or more (in money or other property) from any one contributor Complete Parts I and II See instructions for determining a contributor's total contributions

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc , purposes, but no such contributions totaled more than $1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions totaling $5,000 or more during the year . . . . ▶ $ ____________

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization	**Employer identification number**
MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION	04-2023566

Part I **Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ANONYMOUS 353 SOUTHERN ARTERY QUINCY, MA 02169	$ 300,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
2	ANONYMOUS 353 SOUTHERN ARTERY QUINCY, MA 02169	$ 30,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
3	ANONYMOUS 353 SOUTHERN ARTERY QUINCY, MA 02169	$ 30,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
4	ANONYMOUS 353 SOUTHERN ARTERY QUINCY, MA 02169	$ 25,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
5	NORTHEAST ARC COFFEE SHOP 1 SOUTHSIDE ROAD DANVERS, MA 01923	$ 15,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
6	ANONYMOUS 353 SOUTHERN ARTERY QUINCY, MA 02169	$ 5,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization	Employer identification number
MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION	04-2023566

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
		$	

(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
		$	

(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
		$	

(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

Name of organization	**Employer identification number**
MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION	04-2023566

Part III ***Exclusively*** **religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than $1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of** ***exclusively*** **religious, charitable, etc., contributions of $1,000 or less for the year. (Enter this information once. See instructions.) ▶ $** ____________

Use duplicate copies of Part III if additional space is needed

(a) No.from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

(a) No.from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

(a) No.from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

(a) No.from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee