

EXTENDED TO NOVEMBER 15, 2017

## 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.irs.gov/form990pf

OMB No. 1545-0052

2016

Open to Public Inspection

Form 990-PF

Department of the Treasury  
Internal Revenue Service

For calendar year 2016 or tax year beginning

, and ending

Name of foundation <b>EDMUND &amp; BETSY CABOT CHARITABLE FNDN</b>		A Employer identification number <b>04-2900424</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>22 BATTERYMARCH STREET, 2ND FLOOR</b>	Room/suite	B Telephone number <b>617.451.1744</b>
City or town, state or province, country, and ZIP or foreign postal code <b>BOSTON, MA 02109</b>		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input checked="" type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <b>\$ 9,375,418.</b> (Part I, column (d) must be on cash basis)	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received					
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		110,052.	108,072.		STATEMENT 1
5a Gross rents		-3,695.	-3,695.		STATEMENT 2
b Net rental income or (loss)		-3,695.			
6a Net gain or (loss) from sale of assets not on line 10		387,278.			
b Gross sales price for all assets on line 6a		3,107,974.			
7 Capital gain net income (from Part IV, line 2)			387,278.		
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)		2,468.	2,468.	0.	STATEMENT 3
11 Other income		496,103.	494,123.	0.	
12 Total. Add lines 1 through 11		0.	0.	0.	0.
13 Compensation of officers, directors, trustees, etc.					
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 4		9,400.	4,700.	0.	4,700.
c Other professional fees STMT 5		53,906.	40,406.	0.	13,500.
17 Interest					
18 Taxes STMT 6		11,336.	4,472.	0.	0.
19 Depreciation and depletion		233.	233.	0.	
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 7		28,224.	27,594.	0.	0.
24 Total operating and administrative expenses. Add lines 13 through 23		103,099.	77,405.	0.	18,200.
25 Contributions, gifts, grants paid		480,750.			480,750.
26 Total expenses and disbursements. Add lines 24 and 25		583,849.	77,405.	0.	498,950.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-87,746.			
b Net investment income (if negative, enter -0-)			416,718.		
c Adjusted net income (if negative, enter -0-)				0.	

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

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Part II Balance Sheets		Beginning of year		End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1 Cash - non-interest-bearing	41,896.	26,389.	26,389.	
	2 Savings and temporary cash investments	1,631,558.	1,085,350.	1,085,350.	
	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				
	10a Investments - U.S. and state government obligations STMT 8	207,916.	899,546.	878,155.	
	b Investments - corporate stock STMT 9	1,673,025.	709,963.	1,324,694.	
	c Investments - corporate bonds STMT 10	0.	483,310.	466,794.	
	Liabilities	11 Investments - land, buildings, and equipment basis ▶			
Less accumulated depreciation ▶					
12 Investments - mortgage loans					
13 Investments - other STMT 11		4,886,961.	5,138,679.	5,588,003.	
14 Land, buildings, and equipment basis ▶					
Less accumulated depreciation ▶					
15 Other assets (describe ▶ <b>PREPAID TAXES</b> )		5,867.	6,033.	6,033.	
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		8,447,223.	8,349,270.	9,375,418.	
17 Accounts payable and accrued expenses		9,300.			
18 Grants payable					
Net Assets or Fund Balances	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable				
	22 Other liabilities (describe ▶)				
23 Total liabilities (add lines 17 through 22)	9,300.	0.			
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input type="checkbox"/>				
	24 Unrestricted				
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>				
	27 Capital stock, trust principal, or current funds	2,186,691.	2,186,691.		
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.		
29 Retained earnings, accumulated income, endowment, or other funds	6,251,232.	6,162,579.			
30 Total net assets or fund balances .....	8,437,923.	8,349,270.			
31 Total liabilities and net assets/fund balances	8,447,223.	8,349,270.			

## 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	8,437,923.
2 Enter amount from Part I, line 27a	2	-87,746.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	8,350,177.
5 Decreases not included in line 2 (itemize) ▶ <b>BOOK/TAX DIFFERENCES</b>	5	907.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	8,349,270.

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**Part IV Capital Gains and Losses for Tax on Investment Income****SEE ATTACHED STATEMENT**

(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			
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			
b			
c			
d			
e	3,107,974.	2,720,696.	387,278.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			387,278.

2 Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	2	387,278.
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		3	N/A

**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 the 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	386,150.	9,750,796.	.039602
2014	503,019.	10,057,170.	.050016
2013	234,494.	3,647,644.	.064286
2012	142,093.	2,591,024.	.054840
2011	83,461.	2,615,322.	.031912

2 Total of line 1, column (d)	2	.240656
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	.048131
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	9,050,807.
5 Multiply line 4 by line 3	5	435,624.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	4,167.
7 Add lines 5 and 6	7	439,791.
8 Enter qualifying distributions from Part XII, line 4	8	498,950.

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 <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	4,167.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	4,167.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	4,167.
6 Credits/Payments:			
a 2016 estimated tax payments and 2015 overpayment credited to 2016	6a	12,033.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	12,033.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	7,866.	
11 Enter the amount of line 10 to be: Credited to 2017 estimated tax <input checked="" type="checkbox"/> 7,866. Refunded <input type="checkbox"/>	11	0.	

**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?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
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		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	X	
b If "Yes," has it filed a tax return on Form 990-T for this year?	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
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?	X	
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	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <u>MA</u>		
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	X	
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		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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**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)		X
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)		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	X	
Website address ► N/A		
14 The books are in care of ► CABOT-WELLINGTON LLC Telephone no. ► 617.451.1744		
Located at ► 22 BATTERYMARCH STREET, BOSTON, MA ZIP+4 ► 02109		
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, securities, or other financial account in a foreign country?	Yes	No
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	16	X

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (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.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	► <input type="checkbox"/>	
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?	1b	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)):	1c	X
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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
If "Yes," list the years ►		
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.)	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	2b	
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 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)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	3b	
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?	4a	X
	4b	X

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**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)?

N/A

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?

N/A

☐ 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 ☐ ☒

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?

N/A

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.

(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
ELIZABETH W. CABOT	TRUSTEE			
70 FEDERAL STREET, 7TH FLOOR				
BOSTON, MA 02110	1.00	0.	0.	0.
BRADFORD W. CABOT	TRUSTEE			
70 FEDERAL STREET, 7TH FLOOR				
BOSTON, MA 02110	1.00	0.	0.	0.

**2** Compensation of five highest-paid employees (other than those included 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
NONE				

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

0

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**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	6,028,746.
b	Average of monthly cash balances	1b	913,263.
c	Fair market value of all other assets	1c	2,246,628.
d	<b>Total</b> (add lines 1a, b, and c)	1d	9,188,637.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	9,188,637.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	137,830.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	9,050,807.
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	452,540.

**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	452,540.
2a	Tax on investment income for 2016 from Part VI, line 5	2a	4,167.
b	Income tax for 2016. (This does not include the tax from Part VI.)	2b	789.
c	Add lines 2a and 2b	2c	4,956.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	447,584.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	447,584.
6	Deduction from distributable amount (see instructions)	6	0.
7	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	447,584.

**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	498,950.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	498,950.
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	4,167.
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	494,783.

**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.

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**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				447,584.
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only			14,478.	
b Total for prior years:		0.		
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	0.			
4 Qualifying distributions for 2016 from Part XII, line 4: ▶ \$ 498,950.				
a Applied to 2015, but not more than line 2a			14,478.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2016 distributable amount				447,584.
e Remaining amount distributed out of corpus	36,888.			
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus: Add lines 3f, 4c, and 4e. Subtract line 5	36,888.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2015. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2016. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2017				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2011 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	36,888.			
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	36,888.			

**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

b Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(j)(3) or ☐ 4942(j)(5)

2 a 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 foundation 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).)

**SEE STATEMENT 12**

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

**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:

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:

**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
<b>a</b> Paid during the year				
SEE ATTACHED SCHEDULE				480,750.
<b>Total</b>			<b>3a</b>	480,750.
<b>b</b> Approved for future payment				
NONE				
<b>Total</b>			<b>3b</b>	0.



	Yes	No
1) _____		
2) _____		X
3) _____		X
4) _____		
5) _____		X
6) _____		X
7) _____		X
8) _____		X
9) _____		X
10) _____		X

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**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	NATIONAL FINANCIAL SERVICES LLC #1670	P	01/21/11	07/11/16
b	NATIONAL FINANCIAL SERVICES LLC #1670	P	VARIOUS	12/31/16
c	NATIONAL FINANCIAL SERVICES LLC #1590	P	VARIOUS	12/31/16
d	NATIONAL FINANCIAL SERVICES LLC #1590	P	VARIOUS	06/20/16
e	NATIONAL FINANCIAL SERVICES LLC #1590	P	05/22/14	07/05/16
f	JK ASIAN INVEST LP	P	VARIOUS	10/07/16
g	SHORT-TERM PARTNERSHIPS	P	VARIOUS	12/31/16
h	LONG-TERM PARTNERSHIPS	P	VARIOUS	12/31/16
i	1231 GAIN - PARTNERSHIPS	P	VARIOUS	12/31/16
j	1256 ST GAIN - PARTNERSHIPS	P	VARIOUS	12/31/16
k	1256 LT GAIN - PARTNERSHIPS	P	VARIOUS	12/31/16
l	CAPITAL GAINS DIVIDENDS			
m				
n				
o				

(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 23,167.		12,644.	10,523.
b 1,289,666.		950,417.	339,249.
c 30,480.		30,506.	-26.
d 1,169,335.		1,200,060.	-30,725.
e 216,557.		209,501.	7,056.
f 273,308.		317,568.	-44,260.
g 1,473.			1,473.
h 52,419.			52,419.
i 11,099.			11,099.
j 32.			32.
k 48.			48.
l 40,390.			40,390.
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			10,523.
b			339,249.
c			-26.
d			-30,725.
e			7,056.
f			-44,260.
g			1,473.
h			52,419.
i			11,099.
j			32.
k			48.
l			40,390.
m			
n			
o			

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	387,278.
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 }	3	N/A

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES			STATEMENT 1	
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
ACCRUED INTEREST PAID	-7,425.	0.	-7,425.	-7,425.	-7,425.
BOND PREMIUM INVESTMENT	-2,080.	0.	-2,080.	-2,080.	-2,080.
PARTNERSHIPS/US INTEREST	28,089.	0.	28,089.	26,109.	28,089.
STOCKS AND MUTUAL FUNDS	127,134.	40,390.	86,744.	86,744.	86,744.
US TREASURY	3,369.	0.	3,369.	3,369.	3,369.
US TREASURY OID	1,355.	0.	1,355.	1,355.	1,355.
TO PART I, LINE 4	150,442.	40,390.	110,052.	108,072.	110,052.

FORM 990-PF	RENTAL INCOME		STATEMENT 2	
KIND AND LOCATION OF PROPERTY	ACTIVITY NUMBER	GROSS RENTAL INCOME		
INVESTMENT PARTNERSHIPS	1	-3,695.		
TOTAL TO FORM 990-PF, PART I, LINE 5A		-3,695.		

FORM 990-PF	OTHER INCOME			STATEMENT 3	
DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME		
INVESTMENT PARTNERSHIPS	771.	771.	0.		
CANCELLATION OF DEBT INCOME FROM PARTNERSHIPS	38.	38.	0.		
ORDINARY INCOME FROM PARTNERSHIPS	-3,622.	-3,622.	0.		
ROYALTY INCOME FROM PARTNERSHIPS	68.	68.	0.		
TAX REFUND	5,213.	5,213.	0.		
TOTAL TO FORM 990-PF, PART I, LINE 11	2,468.	2,468.	0.		

FORM 990-PF	ACCOUNTING FEES			STATEMENT 4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX PREPARATION	9,400.	4,700.	0.	4,700.
TO FORM 990-PF, PG 1, LN 16B	9,400.	4,700.	0.	4,700.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT	40,406.	40,406.	0.	0.
OFFICE EXPENSES	13,500.	0.	0.	13,500.
TO FORM 990-PF, PG 1, LN 16C	53,906.	40,406.	0.	13,500.

FORM 990-PF	TAXES			STATEMENT 6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES WITHHELD ON				
DIVIDENDS	2,827.	2,827.	0.	0.
EXCISE TAX: FORM 990-PF	6,864.	0.	0.	0.
PARTNERSHIP FOREIGN TAXES				
PAID	1,568.	1,568.	0.	0.
PARTNERSHIP JAPANESE TAXES				
PAID	77.	77.	0.	0.
TO FORM 990-PF, PG 1, LN 18	11,336.	4,472.	0.	0.



## FORM 990-PF

## OTHER EXPENSES

## STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MA FILING FEES	70.	0.	0.	0.
PARTNERSHIP INVESTMENT EXPENSES	28,154.	27,594.	0.	0.
TO FORM 990-PF, PG 1, LN 23	28,224.	27,594.	0.	0.

## FORM 990-PF

## U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS

## STATEMENT 8

DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
	X		331,301.	323,511.
		X	568,245.	554,644.
TOTAL U.S. GOVERNMENT OBLIGATIONS			331,301.	323,511.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			568,245.	554,644.
TOTAL TO FORM 990-PF, PART II, LINE 10A			899,546.	878,155.

## FORM 990-PF

## CORPORATE STOCK

## STATEMENT 9

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
	709,963.	1,324,694.
TOTAL TO FORM 990-PF, PART II, LINE 10B	709,963.	1,324,694.

## FORM 990-PF

## CORPORATE BONDS

## STATEMENT 10

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
	483,310.	466,794.
TOTAL TO FORM 990-PF, PART II, LINE 10C	483,310.	466,794.

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FORM 990-PF	OTHER INVESTMENTS	STATEMENT 11
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
	COST	5,138,679.	5,588,003.
TOTAL TO FORM 990-PF, PART II, LINE 13		5,138,679.	5,588,003.

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FORM 990-PF	PART XV - LINE 1A LIST OF FOUNDATION MANAGERS	STATEMENT 12
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NAME OF MANAGER

ELIZABETH W. CABOT  
BRADFORD W. CABOT

## U.S. Government Obligations: Line 10a

Description	Quantity	Cost Basis	Current Value
US Treasury Note 3/31/2017 (1%)	25,000	25,105	25,031
US Treasury Note 9/30/2017 (0.62%)	55,000	54,994	54,922
US Treasury Note 9/30/2018 (1.37%)	55,000	55,708	55,206
US Treasury Note 6/30/2019 (1%)	55,000	55,518	54,570
US Treasury Note 5/31/2020 (1.37%)	40,000	40,537	39,747
US Treasury Note 2/15/2023 (2%)	55,000	57,895	54,547
US Treasury Note 11/15/2025 (2.25%)	40,000	41,544	39,488
		<b>331,301</b>	<b>323,511</b>

## State and Municipal Obligations: Line 10a

San Bernardino Calif Community College	40,000	40,326	40,100
Texas St Go Wtr Financial Assistance	60,000	60,477	60,202
Bank of Nova Scotia	30,000	30,122	29,915
Goldman Sachs Group	15,000	15,413	15,207
Bnp Paribas	25,000	25,631	25,302
Univestry Calif Revs	55,000	55,869	55,156
Little Miami Ohio Loc School District	55,000	55,020	54,089
New York NYC Transitional	50,000	51,989	50,745
Honolulu Hawaii City & County	50,000	52,155	51,070
Texas Tech University Revs	55,000	57,380	55,413
Medtronic Inc	25,000	26,490	25,606
Merck & Co Inc	25,000	25,811	24,507
Public Service Electric & Gas Co	25,000	26,720	25,196
Imperial California Irr Dist Electric	45,000	44,842	42,136
		<b>568,245</b>	<b>554,644</b>

## Common Stock: Line 10b

Cabot Oil & Gas Corp	3,200,000	32,710	74,752
JPMorgan Chase & Co	4,150	241,986	358,104
Gilead Sciences	3,000	76,386	214,830
Google, Inc	100	59,440	79,245
State Street Corp	1,525	96,106	118,523
Stryker Corp	4,000	203,335	479,240
		<b>709,963</b>	<b>1,324,694</b>

## Corporate Bonds: Line 10c

American Express Cr Corp	25,000	25,270	25,063
Toyota Motor Cred	30,000	30,127	29,867
UnitedHealth Group Inc	20,000	20,285	19,940
Citigroup Inc	15,000	15,304	15,103
Bank America Corp	10,000	10,092	9,942
Morgan Stanley	15,000	15,393	15,123
Csx Corp	10,000	10,744	10,388
Wells Fargo & Co	25,000	25,620	24,815
Duke Energy Carolinas LLC	25,000	27,611	26,536
Oracle Corp	25,000	25,913	24,827
Apple Inc	25,000	26,102	25,156
John Deere Cap Corp	25,000	26,288	25,001
Verizon Communications Inc	15,000	17,521	16,586
Comcast Corp	25,000	27,559	25,805
Shell International Fin Bv	25,000	25,906	24,980
AT&T Inc	15,000	16,128	15,189
Berkshire Hathaway Inc	25,000	25,936	24,838
JP Morgan Chase & Co	25,000	25,755	24,564
Starbucks Corp	25,000	25,403	23,859
Toronto Dominion Bank	30,000	30,172	29,928
Statoil Asa	30,000	30,181	29,284
		<b>483,310</b>	<b>466,794</b>

## Mutual Funds and Investment Partnerships: Line 13

AESIP (Asia) Fund LP *	-	-	-
Sanderson International Value Fund *	144,777	326,401	246,195
CW Hedge Fund I * (++)	86,560	101,600	126,204
CW Hedge Fund II * (++)	489,440	610,485	660,338
EBC Family Investment, LLC *	3,280	576,871	643,631
Park Street Natural Resource Fund *	46,375	35,536	46,375
Cabot Wellington Real Asset Fund 2011 *	63,000	64,538	85,784
Cabot Wellington Real Estate Fund I *	50,000	13,779	15,633
Cabot Wellington Real Estate Fund II *	45,500	13,133	12,720
Cabot Wellington Real Estate Fund III *	55,300	22,448	42,100
CW Private Equity 2007, LLC *	150,750	106,727	187,009
CW Private Equity Fund 2011 *	72,000	81,023	120,137
CW Venture Fund IV, LLC *	89,000	37,976	58,302
Edgewood Growth Fund Instl Cl	20,627,186	412,780	458,130
Iva International Fund Cl I	71,911,322	1,157,310	1,134,761
T Rowe Small-Cap Value Fund	5,102,612	231,265	230,281
Mathews Asia Small Companies Fund	7,353,857	118,397	140,091
Mathews Tiger Emerging Asia	9,759,007	100,255	129,014
Mathews Pacific Tiger (I) Fund	24,926,769	465,345	570,823
Aberdeen Emerging Markets	17,133,473	250,060	215,196
Vulcan Value Partners Fund	25,942,803	412,750	463,079
		<b>5,138,679</b>	<b>5,588,003</b>

Edmund and Betsy Cabot Charitable Foundation 04-2900424  
Form 990-PF for the Calendar Year 2016  
Schedule of Charitable Contributions

None of the donees are an individual, all gifts were made in furtherance of the exempt purposes of the donee organizations

<u>Charitable Organizations</u>	<u>Date</u>	<u>Contributions</u>
American Alpine Club	4/25/16	\$ 5,000 00
American Repertory Theater	4/25/16	\$ 1,000 00
American Mountaineering Museum	8/24/16	\$ 5,000 00
Appalachian Mountain Club	4/25/16	\$ 1,000 00
Associates of Boston Public Library	4/25/16	\$ 5,000 00
Associates of Boston Public Library	9/14/16	\$ 5,000 00
Ballard Food Bank	8/24/16	\$ 1,000 00
Beaver Country Day	4/25/16	\$ 1,000 00
Belmont Day School	4/25/2016	\$ 1,000 00
Berklee College of Music	3/31/2016	\$ 1,000 00
Beth Israel Hospital	4/25/16	\$ 5,000 00
Blue Marble Dreams	8/24/16	\$ 1,000 00
Boston Athenaeum	3/8/16	\$ 1,000 00
Boston Athenaeum	10/4/16	\$ 1,000 00
Boston Landmarks Orchestra	4/25/16	\$ 1,000 00
Boston Landmarks Orchestra	10/4/16	\$ 1,000 00
Boston Lyric Opera of NE	4/12/16	\$ 6,000 00
Boston Lyric Opera of NE	6/7/16	\$ 5,000 00
Boston Museum of Science	3/8/16	\$ 5,000 00
Boston Museum of Science	4/12/16	\$ 1,000 00
Boston Museum of Science	6/7/16	\$ 5,000 00
Boston Museum of Science	9/14/16	\$ 2,000 00
Boston Museum of Science	11/15/16	\$ 1,000 00
Boston Museum of Science	11/17/16	\$ 20,000 00
Boston Symphony Orchestra	4/25/16	\$ 1,000 00
Boys and Girls Clubs of Boston	11/4/16	\$ 1,000 00
Boys and Girls Clubs of Boston	12/15/16	\$ 5,000 00
Cantata Singers, Inc	8/24/16	\$ 1,000 00
Career Collaborative	4/25/16	\$ 1,000 00
Career Collaborative	8/24/16	\$ 1,000 00
Children's Hospital	4/25/16	\$ 2,000 00
Children's Museum of Boston	4/25/16	\$ 1,000 00
Children's Museum of Boston	8/24/16	\$ 1,000 00
Chocorua Chapel Association	4/25/16	\$ 500 00
Chocorua Chapel Association	11/17/16	\$ 500 00
Colorado College	4/25/16	\$ 5,000 00
Colorado Rocky Mountain School	4/25/16	\$ 2,000 00
Community Charter School of Cambridge	8/24/16	\$ 5,000 00
Conservatory Lab Charter School	4/25/16	\$ 5,000 00
Craig Hospital	4/25/16	\$ 5,000 00
Culebra Range Community Coalition	4/25/16	\$ 8,000 00
Culebra Range Community Coalition	8/24/16	\$ 5,000 00
Culebra Range Community Coalition	11/17/16	\$ 10,000 00
Dana Farber Cancer Institute	8/24/16	\$ 1,000 00
Dana Hall School	4/25/16	\$ 1,000 00
Dana Hall School	8/24/16	\$ 1,000 00
Deer Isle Volunteer Fire	8/24/16	\$ 500 00
Emerald Necklace Conservatory	3/18/16	\$ 2,000 00
Emerald Necklace Conservatory	4/12/16	\$ 2,000 00
Emerald Necklace Conservatory	9/23/16	\$ 2,000 00
Executive Service Corps	8/24/16	\$ 1,000 00
Family to Family Project	4/25/16	\$ 2,000 00
Family to Family Project	8/24/16	\$ 2,000 00
Family to Family Project	11/17/16	\$ 10,000 00
Fare Start	11/17/16	\$ 1,000 00
Fessenden School	4/25/16	\$ 500 00
Foundation for Belmont Education	2/9/16	\$ 1,000 00
Friends of Arts Street	4/25/16	\$ 2,500 00
Friends of Colombian Orphanage, Inc	10/7/16	\$ 5,000 00
Friends of Harvard Skunk	4/25/16	\$ 500 00
Gateway Arts	4/25/16	\$ 1,000 00
Greater Boston Food Bank	4/25/16	\$ 5,000 00
Greater Boston Food Bank	8/24/16	\$ 5,000 00
Habitat Institute	4/25/16	\$ 1,000 00
Handel & Haydn Society	2/9/16	\$ 5,000 00
Handel & Haydn Society	8/24/16	\$ 5,000 00
Handel & Haydn Society	11/17/16	\$ 5,000 00
Harvard College Fund	8/24/16	\$ 1,000 00
Harvard Medical School	4/25/16	\$ 5,000 00
Harvard Travelers Club Permanent Fund	4/25/16	\$ 1,000 00
High Mountain Institute	4/25/16	\$ 3,000 00
High Mountain Institute	11/17/16	\$ 10,000 00
Huntington Theatre Company	2/1/16	\$ 5,000 00
Huntington Theatre Company	4/25/16	\$ 3,000 00
Huntington Theatre Company	8/24/16	\$ 2,000 00

Edmund and Betsy Cabot Charitable Foundation 04-2900424  
Form 990-PF for the Calendar Year 2016  
Schedule of Charitable Contributions (continued)

None of the donees are an individual, all gifts were made in furtherance of the exempt purposes of the donee organizations

<u>Charitable Organizations</u>	<u>Date</u>	<u>Contributions</u>
Hurricane Island	4/25/16	\$ 2,000 00
Hurricane Island	8/24/16	\$ 1,000 00
Horizons for Homeless Children	4/25/16	\$ 1,000 00
Island Institute	4/25/16	\$ 1,000 00
Kepler	8/24/16	\$ 3,000 00
Land Trust Alliance	4/25/16	\$ 2,500 00
Lesley University	4/12/16	\$ 5,000 00
Lesley University	12/6/16	\$ 21,000 00
Longs School of Music of Bard College	2/9/16	\$ 500 00
Maine Coast Heritage Trust	8/24/16	\$ 1,000 00
Maine Island Trail Association	2/9/16	\$ 1,000 00
Maine Island Trail Association	8/24/16	\$ 5,000 00
Make-a-Wish Foundation	5/18/16	\$ 250 00
Massachusetts Audubon	4/25/16	\$ 5,000 00
Massachusetts Audubon	8/24/16	\$ 5,000 00
Max Warburg Courage Curriculum	2/9/16	\$ 3,000 00
Max Warburg Courage Curriculum	4/25/16	\$ 1,000 00
Max Warburg Courage Curriculum	8/24/16	\$ 1,000 00
Mount Auburn Hospital	4/25/16	\$ 3,000 00
Mount Auburn Hospital	8/24/16	\$ 3,000 00
Mount Carmel Center of Excellence	11/16/16	\$ 2,500 00
Mount Carmel Health, Wellness & Community	11/16/16	\$ 2,500 00
Mount Washington Observatory	4/25/16	\$ 5,000 00
Museum of Fine Arts	4/25/16	\$ 3,000 00
New England Aquarium	4/25/16	\$ 5,000 00
New England Baptist Hospital	4/26/16	\$ 2,500 00
New England Baptist Hospital	8/24/16	\$ 2,500 00
New England Conservatory	2/1/16	\$ 5,000 00
New England Conservatory	8/24/16	\$ 5,000 00
New Hampshire Public Radio	11/16/16	\$ 1,000 00
Next Step Archery	11/15/16	\$ 5,000 00
North Bennet Street School	11/17/16	\$ 1,000 00
Passum	4/26/16	\$ 500 00
Penna Chodron Foundation	11/17/16	\$ 5,000 00
Perkins School for the Blind	5/18/16	\$ 1 000 00
Pine Street Inn	4/26/16	\$ 3,000 00
Pine Street Inn	8/24/16	\$ 2,000 00
Powers Music School	4/26/16	\$ 10,000 00
Powers Music School	8/24/16	\$ 5,000 00
Powers Music School	11/17/16	\$ 10,000 00
Proctor Academy	4/26/16	\$ 5,000 00
Project Hope	8/16/16	\$ 2,000 00
Puget Soundkeeper Alliance	10/28/16	\$ 5,000 00
Quest Adventures	8/24/16	\$ 5,000 00
Rose's Place	4/26/16	\$ 5,000 00
Rose's Place	8/24/16	\$ 5,000 00
S E A Education Association	4/26/16	\$ 5,000 00
S E A Education Association	11/15/16	\$ 15,000 00
Sailors for the Sea	4/26/16	\$ 5,000 00
Silver Lining Mentoring	11/4/16	\$ 1,000 00
Squam Lakes Conservation Society	4/26/16	\$ 1,000 00
Squam Lakes Conservation Society	6/21/16	\$ 500 00
The 1891 Society - TTOR	8/24/16	\$ 1,000 00
The Fern School	3/8/16	\$ 5,000 00
The Nature Conservancy	4/26/16	\$ 1,000 00
The Revels	3/18/16	\$ 2,500 00
The Trustees of Reservations	11/17/16	\$ 1,000 00
Thompson Island	4/26/16	\$ 2,000 00
Thompson Island	8/24/16	\$ 3,000 00
Trustees of Phillips Academy	4/26/16	\$ 5,000 00
University District Food Bank	8/24/16	\$ 5,000 00
University District Food Bank	10/7/16	\$ 5,000 00
Upaya Zen Center	11/17/16	\$ 5,000 00
WBUR	4/26/16	\$ 500 00
West End House Boys and Girls Club	8/8/16	\$ 5,000 00
Western Washington University	8/24/16	\$ 1,000 00
WGBH Channel 2	4/26/16	\$ 3,000 00
WGBH Channel 2	8/24/16	\$ 2,000 00
WGBH Radio 89.7	4/26/16	\$ 500 00
WGBH Radio 89.7	8/24/16	\$ 1,000 00
Woods Hole Oceanographic Institute	4/26/16	\$ 1,000 00
Young Audiences of Mass.	4/26/16	\$ 1,000 00
YouthBuild Boston	2/9/16	\$ 1,000 00
		<u>\$ 480,750.00</u>