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# Return of Private Foundation

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

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2015

Open to Public Inspection

For calendar year 2015 or tax year beginning **January 1**, 2015, and ending **December 31st**, 2016

Name of foundation <b>Healy Charitable Foundation, Inc</b>		A Employer identification number <b>04-2937389</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>211 Dalton Road</b>		Room/suite
City or town, state or province, country, and ZIP or foreign postal code <b>Holliston, MA 01746</b>		B Telephone number (see instructions) <b>8024297700</b>
<b>G</b> Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input checked="" type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		C If exemption application is pending, check here ► <input type="checkbox"/>
<b>H</b> 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		D 1. Foreign organizations, check here ► <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation ► <input type="checkbox"/>
<b>I</b> Fair market value of all assets at end of year (from Part II, col. (c), line 16) ► <b>\$ 185,824</b> (Part I, column (d) must be on cash basis)		E If private foundation status was terminated under section 507(b)(1)(A), check here ► <input type="checkbox"/>
		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) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check ► <input type="checkbox"/> if the foundation is <b>not</b> required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities . . . . .	4,361	4,361		
	5a Gross rents . . . . .				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2) . . .		2,501		
	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) . . . . .					
12 <b>Total.</b> Add lines 1 through 11 . . . . .	<b>4,361</b>	<b>6,862</b>			
<b>Operating and Administrative Expenses</b>	13 Compensation of officers, directors, trustees, etc.				
	14 Other employee salaries and wages . . . . .				
	15 Pension plans, employee benefits . . . . .				
	16a Legal fees (attach schedule) . . . . .				
	b Accounting fees (attach schedule) . . . . .				
	c Other professional fees (attach schedule) . . . . .				
	17 Interest . . . . .	<b>RECEIVED</b>			
	18 Taxes (attach schedule) (see instructions) . . . . .		18 AUG 22 2016	IRS-OGDEN, UT	
	19 Depreciation (attach schedule) and depletion . . . . .				
	20 Occupancy . . . . .				
	21 Travel, conferences, and meetings . . . . .				
	22 Printing and publications . . . . .				
	23 Other expenses (attach schedule) . . . . .				
	24 <b>Total operating and administrative expenses.</b> Add lines 13 through 23 . . . . .				
25 Contributions, gifts, grants paid . . . . .	7,700			7,700	
26 <b>Total expenses and disbursements.</b> Add lines 24 and 25	<b>7,700</b>			<b>7,700</b>	
27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-)	(3339)			6,862	

<b>Part II Balance Sheets</b>		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)	<b>Beginning of year</b>	<b>End of year</b>	
			<b>(a) Book Value</b>	<b>(b) Book Value</b>	<b>(c) Fair Market Value</b>
<b>Assets</b>	1	Cash—non-interest-bearing . . . . .	<b>5,548</b>	<b>5,014</b>	<b>5,014</b>
	2	Savings and temporary cash investments . . . . .			
	3	Accounts receivable ►			
		Less: allowance for doubtful accounts ►			
	4	Pledges receivable ►			
		Less: allowance for doubtful accounts ►			
	5	Grants receivable . . . . .			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	7	Other notes and loans receivable (attach schedule) ►			
		Less: allowance for doubtful accounts ►			
	8	Inventories for sale or use . . . . .			
	9	Prepaid expenses and deferred charges . . . . .			
	10a	Investments—U.S. and state government obligations (attach schedule) . . . . .			
	b	Investments—corporate stock (attach schedule) . . . . .	<b>92,015</b>	<b>90,277</b>	<b>138,981</b>
	c	Investments—corporate bonds (attach schedule) . . . . .	<b>43,076</b>	<b>42,445</b>	<b>41,829</b>
	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 ►				
	Less accumulated depreciation (attach schedule) ►				
15	Other assets (describe ►) . . . . .				
16	<b>Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I) . . . . .	<b>140,639</b>	<b>137,736</b>	<b>185,824</b>	
<b>Liabilities</b>	17	Accounts payable and accrued expenses . . . . .			
	18	Grants payable . . . . .			
	19	Deferred revenue . . . . .			
	20	Loans from officers, directors, trustees, and other disqualified persons . . . . .			
	21	Mortgages and other notes payable (attach schedule) . . . . .			
	22	Other liabilities (describe ►) . . . . .			
	23	<b>Total liabilities</b> (add lines 17 through 22) . . . . .			
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow SFAS 117, check here ► <input type="checkbox"/></b> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted . . . . .	<b>140,639</b>	<b>137,736</b>	
	25	Temporarily restricted . . . . .			
	26	Permanently restricted . . . . .			
	<b>Foundations that do not follow SFAS 117, check here ► <input type="checkbox"/></b> 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	<b>Total net assets or fund balances</b> (see instructions) . . . . .	<b>140,639</b>	<b>137,736</b>	
	31	<b>Total liabilities and net assets/fund balances</b> (see instructions) . . . . .	<b>140,639</b>	<b>137,736</b>	
<b>Part III Analysis of Changes in Net Assets or Fund Balances</b>					
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) . . . . .		<b>1</b>		<b>140,639</b>
2	Enter amount from Part I, line 27a . . . . .		<b>2</b>		<b>(3,339)S</b>
3	Other increases not included in line 2 (itemize) ►		<b>3</b>		
4	Add lines 1, 2, and 3 . . . . .		<b>4</b>		
5	Decreases not included in line 2 (itemize) ►		<b>5</b>		
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .		<b>6</b>		<b>137,300</b>

**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.)
<b>1a See Attachment</b>					
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
(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 9,225		6,724	2,501		
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) 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					
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	2,501	
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 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))
2014	7,500	189,670	.0395
2013	6,760	161,714	.0490
2012	6,050	151,704	.0374
2011	6,050	141,604	.0427
2010	5,500	158,854	.0345
<b>2 Total of line 1, column (d)</b>			<b>.2031</b>
<b>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</b>			<b>.0406</b>
<b>4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5</b>			<b>184,932</b>
<b>5 Multiply line 4 by line 3</b>			<b>7,512</b>
<b>6 Enter 1% of net investment income (1% of Part I, line 27b)</b>			<b>69</b>
<b>7 Add lines 5 and 6</b>			<b>7,581</b>
<b>8 Enter qualifying distributions from Part XII, line 4</b>			<b>7,700</b>
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)	1	69
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		
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-)		
3	Add lines 1 and 2	2	69
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-		
6	Credits/Payments:		
a	2015 estimated tax payments and 2014 overpayment credited to 2015	6a	69
b	Exempt foreign organizations—tax withheld at source		
c	Tax paid with application for extension of time to file (Form 8868)		
d	Backup withholding erroneously withheld		
7	Total credits and payments. Add lines 6a through 6d	7	138
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached		
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>		
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>		
11	Enter the amount of line 10 to be: <b>Credited to 2016 estimated tax</b> ►	69	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	✓
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)?	1b	✓
<i>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.</i>			
c	Did the foundation file <b>Form 1120-POL</b> for this year?	1c	✓
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? <i>If "Yes," attach a detailed description of the activities.</i>	2	✓
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? <i>If "Yes," attach a conformed copy of the changes</i>	3	✓
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	✓
b	If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year?	4b	✓
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5	✓
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	✓
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV</i>	7	✓
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ►		
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 <i>General Instruction G</i> ? <i>If "No," attach explanation</i>	8b	✓
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9	✓
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	✓

**Part VII-A Statements Regarding Activities (continued)**

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	Yes	No
11		✓	
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)	Yes	No
12		✓	
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <b>None</b>	Yes	No
13	✓		
14	The books are in care of ► <b>Michael P Healy</b> Telephone no. ► <b>5084297700</b> Located at ► <b>231 Baycrest Drive</b> ZIP+4 ► <b>05403</b>		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —Check here. and enter the amount of tax-exempt interest received or accrued during the year ► <b>15</b>		
16	At any time during calendar year 2015, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	Yes	No
16		✓	

**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.

1a	During the year did the foundation (either directly or indirectly):	Yes	No
(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 type="checkbox"/> Yes	<input checked="" 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 <b>any</b> of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? . . .		
	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 2015? . . .		
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)): . . .		
a	At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? . . .	<input type="checkbox"/> Yes	<input type="checkbox"/> No
	If "Yes," list the years ► <b>20</b> , <b>20</b> , <b>20</b> , <b>20</b>		
b	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.) . . .		
c	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here. ► <b>20</b> , <b>20</b> , <b>20</b> , <b>20</b>		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? . . .	<input type="checkbox"/> Yes	<input type="checkbox"/> No
b	If "Yes," did it have excess business holdings in 2015 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015.) . . .		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? . . .		
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015? . . .		

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

<b>5a</b>	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))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(2)	Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
<b>b</b>	If any answer is "Yes" to 5a(1)–(5), did <b>any</b> 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)?			
	Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>			
<b>c</b>	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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	<i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i>			
<b>6a</b>	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
<b>b</b>	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?			
	<i>If "Yes" to 6b, file Form 8870.</i>			
<b>7a</b>	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
<b>b</b>	If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?			
				<b>7b</b>

**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	(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
Catherine C Healy 211 Dalton Road, MA 01746	President	0	0	0
Michael P Healy 231 Baycrest Drive, South Burlington, VT 05403	Treasurer	0	0	0

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

(a) Name and address of each employee paid more than \$50,000	(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				
<b>Total number of other employees paid over \$50,000</b>				►

**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
Bernstein 53 State Street, 29th Floor Boston, MA 02109	Financial Advisor / Custodian	\$1,225
<b>Total number of others receiving over \$50,000 for professional services</b>		

**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
<b>1</b>	N/A	
<b>2</b>		
<b>3</b>		
<b>4</b>		

**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
<b>1</b>	None	
<b>2</b>		
All other program-related investments. See instructions		
<b>3</b>	None	
<b>Total. Add lines 1 through 3</b>		

**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	176,729
b	Average of monthly cash balances	1b	11,019
c	Fair market value of all other assets (see instructions)	1c	
d	<b>Total</b> (add lines 1a, b, and c)	1d	187,748
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	187,748
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	2,816
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	184,932
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	9,247

**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	9,247
2a	Tax on investment income for 2015 from Part VI, line 5	2a	69
b	Income tax for 2015. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	69
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	9,178
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	9,178
6	Deduction from distributable amount (see instructions)	6	
7	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	9,178

**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	7,700
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	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	7,700
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	
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	7,700

**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 2014	(c) 2014	(d) 2015
1 Distributable amount for 2015 from Part XI, line 7 . . . . .				<b>9,178</b>
2 Undistributed income, if any, as of the end of 2015:				
a Enter amount for 2014 only . . . . .				<b>0</b>
b Total for prior years: 20 ____,20 ____				
3 Excess distributions carryover, if any, to 2015:				
a From 2010 . . . . .				
b From 2011 . . . . .				
c From 2012 . . . . .				
d From 2013 . . . . .				
e From 2014 . . . . .				
f Total of lines 3a through e . . . . .				
4 Qualifying distributions for 2015 from Part XII, line 4: ► \$ <b>7,700</b>				
a Applied to 2014, but not more than line 2a . . . . .				
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 2015 distributable amount . . . . .				
e Remaining amount distributed out of corpus . . . . .				
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a).)				<b>3,573</b>
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 2014. Subtract line 4a from line 2a. Taxable amount—see instructions . . . . .				
f Undistributed income for 2015. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2016 . . . . .				<b>5,605</b>
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) . . . . .	<b>7,700</b>			
8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions) . . . . .				
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a . . . . .	<b>2,095</b>			
10 Analysis of line 9:				
a Excess from 2011 . . . . .				
b Excess from 2012 . . . . .				
c Excess from 2013 . . . . .				
d Excess from 2014 . . . . .				
e Excess from 2015 . . . . .	<b>2,095</b>			

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

<b>1a</b>	If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2015, enter the date of the ruling . . . . . ►			
<b>b</b>	Check box to indicate whether the foundation is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)			
<b>2a</b>	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .			
<b>b</b>	85% of line 2a . . . . .			
<b>c</b>	Qualifying distributions from Part XII, line 4 for each year listed . . . . .			
<b>d</b>	Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .			
<b>e</b>	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .			
<b>3</b>	Complete 3a, b, or c for the alternative test relied upon:			
<b>a</b>	"Assets" alternative test—enter:			
	(1) Value of all assets . . . . .			
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i) . . . . .			
<b>b</b>	"Endowment" alternative test—enter $\frac{1}{3}$ of minimum investment return shown in Part X, line 6 for each year listed . . . . .			
<b>c</b>	"Support" alternative test—enter:			
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .			
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) . . . . .			
	(3) Largest amount of support from an exempt organization . . . . .			
	(4) Gross investment income . . . . .			

**Part XV** **Supplementary Information (Complete this part only if the 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).)

None

**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:

### 6 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	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>Name and address (home or business)</b>				
<b>a Paid during the year</b>				
<b>See Attachment</b>				
<b>Total</b>			► 3a	<b>7,700</b>
<b>b Approved for future payment</b>				
<b>None</b>				
<b>Total</b>			► 3b	<b>0</b>

Part XVI-A | Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

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

(See worksheet in line 13 instructions to verify calculations.)

13

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

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

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?		
		Yes	No
a	Transfers from the reporting foundation to a noncharitable exempt organization of:		
(1)	Cash	1a(1)	✓
(2)	Other assets	1a(2)	✓
b	Other transactions:		
(1)	Sales of assets to a noncharitable exempt organization	1b(1)	✓
(2)	Purchases of assets from a noncharitable exempt organization	1b(2)	✓
(3)	Rental of facilities, equipment, or other assets	1b(3)	✓
(4)	Reimbursement arrangements	1b(4)	✓
(5)	Loans or loan guarantees	1b(5)	✓
(6)	Performance of services or membership or fundraising solicitations	1b(6)	✓
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c	✓
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.		

**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** 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

**Sign  
Here**

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

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

---

**Paid  
Preparer  
Use Only**

Print/Type preparer's name

Preparer's signature

Date

Check  if  
self-employed

—  
—

www.3m.com

**Firm's name** ►

**Firm's EIN**

# Capital Gains Report

## Part IV

HEALY CHARITABLE FOUNDATION (Account: 038-89821)

				January 1, 2015 - December 31, 2015				
Open Date	Close Date	Quantity	Description	Sale Price	Unit Cost	Total Proceeds	Total Cost	Gain or Loss
<b>LONG-TERM</b>								
08/17/2009	01/12/2015	353 360	AB WEALTH APPRECIATION STRATEGY- ADVISOR CLASS	14.73	9.42	5,205.00	3,328.65	1,876.35
08/17/2009	01/12/2015	204 462	BERNSTEIN INTERMEDIATE	13.67	12.92	2,795.00	2,641.65	153.35
08/17/2009	01/23/2015	20 868	AB WEALTH APPRECIATION STRATEGY- ADVISOR CLASS	14.99	9.42	312.81	196.58	116.23
08/17/2009	04/24/2015	19.716	AB WEALTH APPRECIATION STRATEGY- ADVISOR CLASS	15.88	9.42	313.09	185.72	127.37
08/17/2009	07/24/2015	19.941	AB WEALTH APPRECIATION STRATEGY- ADVISOR CLASS	15.43	9.42	307.69	187.84	119.85
08/17/2009	10/22/2015	19 433	AB WEALTH APPRECIATION STRATEGY- ADVISOR CLASS	14.98	9.42	291.10	183.06	108.04
<b>SUBTOTAL FOR LONG-TERM</b>				9.224.69		6,723.50	2,501.19	
<b>TOTAL</b>				\$9,224.69		\$6,723.50	\$2,501.19	

\*\* ACCOUNT TOTALS \*\*

CURRENT PERIOD - GL

LONG-TERM

\$2,501.19

\$2,501.19

## SCHEDULE XV

### HEALY CHARITABLE FOUNDATION, INC. 2015

211 Dalton Road  
Holliston, MA 01746

*A Family Foundation  
Nurturing its Community*

*Catherine C. Healy, President  
Michael P. Healy, Treasurer*

#### DONATIONS FOR 2015

<u>ORGANIZATION</u>	<u>DATE/CHECK #</u>	<u>AMOUNT</u>	<u>PURPOSE</u>
The Alliance for Metrowest Unity c/o Daniel Brown, Esq.	4-8-15 #1162	\$250.00	Operational
Metrowest Legal Services, LLC 63 Fountain Street Framingham, MA 01702			
Andover Newton Theological School 210 Herrick Road Newton Centre, MA 02459 Attn: James Sherblom, Chair	12-19-15 #1180	\$100.00	Operational
Susan G. Komen Foundation (Elizabeth Thompson) 5005 LBJ Freeway Dallas, TX 75244	5-6-2015 #1163	\$ 50.00	Operational
PMC/Jimmy Fund (William Bogaert) 77 4 <sup>th</sup> Avenue Needham, MA 02494	6-24-2015 #1165	\$100.00	Operational
PMC/Jimmy Fund Alan Cantor 77 4 <sup>th</sup> Avenue Needham, MA 02494	7-8-2015 #1168	\$ 50.00	Operational

PMC/Jimmy Fund Nancy Cantor 77 4 <sup>th</sup> Avenue Needham, MA 02494	7-8-2015 #1167	\$ 50.00	Operational
Celebrate Holliston P.O. Box 6476 Holliston, MA 01746 Attn: Andy Porter	12-19-2015 #1181	\$100.00	Operational
Vermont Children's Hospital Fletcher Allen Health Care 111 Colchester Avenue Burlington, VT 05401	12-19-2015 #1182	\$500.00	Operational
Mao Tao Clinic Community Partners International 2560 Ninth St., Suite 315B Berkeley, CA 94710	12-19-2015 #1182	\$500.00	Operational
The BARKA Foundation P.O. Box 2 Burlington, ME 04417	12-19-2015 #1184	\$1000.00	Operational
Unitarian Universalist Service Committee William Schultz, President P.O. Box 808 Newark, NJ 07101-08081	12-19-2015 #1185	\$100.00	Operational
Salvation Army Captain Jaquelin Triston 35 Concord Street Framingham, MA 01702	12-19-2015 #1186	\$100.00	Operational
Paul Miner, CPO United Way of Tri County 46 Park Street Framingham, MA 01702	12-19-2015 #1187	\$100.00	Operational
John F. Kennedy Library Foundation Columbia Point Boston, MA 02125	12-19-2015 #1188	\$100.00	Operational

Mark Jacob, Executive Director Jewish Family Services 475 Franklin Street Framingham, MA 01702	12-19-2015 #1189	\$150.00	Operational
Knox Trail Council Matt Budz – Account Executive 490 Union Street Framingham, MA 01701	12-19-2015 #1190	\$100.00	Operational
Boston Gay Men Chorus 95 Berkeley St., Suite 410 Boston, MA 02116	12-19-2015 #1191	\$250.00	Operational
Classical New England WGBH One Guest Street Boston, MA 02135	12-19-2015 #1192	\$100.00	Operational
WBUR 890 Commonwealth Avenue 3 <sup>rd</sup> Floor Boston, MA 02215	12-19-2015 #1193	\$100.00	Operational
WGBH Channel 2 One Guest Street Boston, MA 02135	12-19-2015 #1194	\$100.00	Operational
Michigan Technological Univ. Dean of Students Student Loan Fund 1400 Townsend Drive Houghton, Michigan 49931-1295	12-19-2015 #1195	\$100.00	Operational
Howard Guthmann National Unitarian Universalist Association of Scouting, Inc. 1300 Northwest Center Fifty-Five East Fifth Street St. Paul, MN 55101-1790	12-19-2015 #1196	\$100.00	Operational

World Food Program USA 1725 I Street, N.W. Suite 510 Washington, D.C.20006	12-19-2015 #1197	\$100.00	Operational
Human Rights Watch 350 Fifth Avenue 34 <sup>th</sup> Floor New York, New York 10018-3299	12-19-2015 #1198	\$100.00	Operational
Holliston Pantry Shelf Attn: Amy Porter 23 Water Street P.O. Box 6662 Holliston, MA 01746	12-19-2015 #1199	\$100.00	Operational
Milford Community Supper Program Al Spittler, President First Unitarian Universalist Church of Milford 23 Pine Street Milford, MA 01757	3-30-2015 #1161	\$ 50.00	Operational
Nepal Relief Fund c/o American Red Cross P.O. Box 37839 Boone, IA 50037-0839	6-8-2015 #1164	\$100.00	Operational
Chaplains on the Way (Becky Sheble-Hall) P.O. Box 541236 Waltham, MA 02454-1236	6-30-2015 #1166	\$100.00	Operational
Holliston Walks for Dana Farber c/o Kathy Chisholm 72 Kim Place Holliston, MA 01746	9-2-2015 #1171	\$350.00	Operational
Doctors Without Borders P.O. Box 5023 Hagerstown, MD 21741-2330	9-14-2015 #1173	\$500.00	Operational

American Foundation of Suicide Prevention (Ms. Joan Hunter-Brody) 18 Prospect Street Holliston, MA 01746	9-14-2015 #1174	\$ 50.00	Operational
Voices Against Violence (c/o South Middlesex Opportunity Council, Inc.) 7 Bishop Street Framingham, MA 01702	10-12-2015 #1175	\$ 50.00	Operational
The Amenyo Corp. (Ghana) c/o Reverend James W. Christensen, President 68 Alton Mountain Road Alton Bay, NH 03810	10-12-2015 #1176	\$500.00	Operational
Brimfield UCC Ministry Discretionary Fund 20 North Main Street Brimfield, MA 01010	10-17-2015 #1177	\$100.00	Operational
International Council of UU's (Burundi Crisis) P.O. Box 2575 Corvallis, OR 97339	11-29-2015 #1178	\$1000.00	Operational
Sandy Hook Promise Foundation P.O. Box 3489 Newtown, CT 06470	12-19-2015 # ??	\$500.00	Operational
<b>Sub Total</b>		<b>\$7,700.00</b>	