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Form 990-PF Department of the Treasury Internal Revenue Service

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/form990p

2016

For calendar year 2016 or tax year beginning and ending Name of foundation A Employer identification number LANDRY FAMILY FOUNDATION 04-2943405 Number and street (or P O box number if mail is not delivered to street address) Room/suite B Telephone number C/O DUNE THORNE 100 HIGH STREET 27TH FL 617-717-6383 City or town, state or province, country, and ZIP or foreign postal code C If exemption application is pending, check here BOSTON, MA 02110 Initial return of a former public charity G Check all that apply: Initial return D 1. Foreign organizations, check here Final return Amended return Foreign organizations meeting the 85% test, check here and attach computation Address change Name change X Section 501(c)(3) exempt private foundation H Check type of organization: E If private foundation status was terminated Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation under section 507(b)(1)(A), check here Fair market value of all assets at end of year J Accounting method: X Cash F If the foundation is in a 60-month termination Other (specify) (from Part II, col (c), line 16) under section 507(b)(1)(B), check here ▶\$ 85,972,057. (Part I, column (d) must be on cash basis) Analysis of Revenue and Expenses (d) Disbursements for charitable purposes (cash basis only) (a) Revenue and (b) Net investment (c) Adjusted net (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) expenses per books 1 Contributions, gifts, grants, etc., received N/A 2 Check X if the foundation is not required to attach Sch B Interest on savings and temporary cash investments 1,498,985. 1,498,985. Dividends and interest from securities STATEMENT 5a Gross rents b Net rental income or (loss) <256,051.> 6a Net gain or (loss) from sale of assets not on line 10 Gross sales price for all assets on line 6a <256,051.> O. 7 Capital gain net income (from Part IV, fine 2) 8 Net short-term capital gain 9 Income modifications 10a and allowances b Less Cost of goods sold c Gross profit or (loss) 179,674. 179,674. STATEMENT 11 Other income 422,608. 678,659. 12 Total. Add lines 1 through 11 RECEIVED 0. 0 0. 13 Compensation of officers, directors, trustees, etc 14 Other employee salaries and wages NUV 16 201 15 Pension plans, employee benefits 2,570. STMT 3 0. 2,570. 16a Legal fees 31,000. OGDEN, U STMT 4 0. 31,000. b Accounting fees STMT 5 354,203. 205,123. 149,080. c Other professional fees 256,320. 256,320. 17 Interest 0. STMT 6 111,590. 23,090. 18 Taxes 0. 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications 398,834. 23 Other expenses STMT 7 397,307. 1,527. 24 Total operating and administrative expenses. Add lines 13 through 23 1,154,517. 881,840. 184,177. 25 Contributions, gifts, grants paid 4,471,913. 4,471,913. 26 Total expenses and disbursements 5,626,430. 881,840. 4,656,090. Add lines 24 and 25 27 Subtract line 26 from line 12: <4,203,822.> & Excess of revenue over expenses and disbursements 796,819. b Net investment income (if negative, enter -0-) N/A C Adjusted net income (if negative, enter -0-) Form 990-PF (2016)

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

2016.05000 LANDRY FAMILY FOUNDATION 10760___

	RY FAMILY FOUND		Income	<u> </u>	3.000000		4-294		Page 3
			SEE ATTACHE		$\overline{}$				
	oe the kind(s) of property sold (e.g shouse; or common stock, 200 sh			1, b	(b) How acquired P - Purchase D - Donation				te sold ay, yr.)
1a	-, -,			1 -	- DOITABOUT	 ` 		<u> </u>	
b									
C							_		
d									
<u>e</u>				<u></u>		<u> </u>			
(e) Gross sales price	(f) Depreciation allowed (or allowable)	1 107	t or other basis xpense of sale				Sain or (loss s (f) minus		
a		<u> </u>							
<u>b</u>				\dashv					
<u>c</u>		 		-+					
e <256,051.>		+		t				<256,	051.>
Complete only for assets showing	gain in column (h) and owned by	the foundation	on 12/31/69			(I) Gains (Col. (h) gain		0010
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Ex	cess of col. (ı) col. (յ), ıf any			col. (k), but	not less that (from col. (n -0-) or	
_a									
b									
<u>c</u>		1		\dashv					
<u>d</u>				\dashv				-0F.C	0.51
<u>e</u>		<u> </u>		\dashv				<256,	021.>
2 Capital gain net income or (net capi	$\{$ If gain, also entertial loss $\}$ (If (loss), enter -	er in Part I, line 0- in Part I, line	7 7	}	2			<256,	051.>
3 Net short-term capital gain or (loss		nd (6):		٦١	ľ				
If gain, also enter in Part I, line 8, co	olumn (c).			1			N/A		
Part V Qualification Un	der Section 4940(e) for	Reduced	Tax on Net	Inve	stment In	come	N/A		
If section 4940(d)(2) applies, leave this Was the foundation liable for the section If "Yes," the foundation does not qualify Enter the appropriate amount in ea	on 4942 tax on the distributable ar y under section 4940(e). Do not c	omplete this pai	t					Yes	X No
(a)	(b)			(c)			Diatril	(d) bution ratio	
Base periód years Calendar year (or tax year beginning	Advioted avalifying di	stributions	Net value of no		ıtable-use ass	ets	(col. (b) div	vided by col	. (c))
2015	5,45	57,948.			, 325 , 47				64725
2014	6,20	09,404.			,727,08				74162
2013		48,726.			,672,09				43896
2012		08,956. 57,216.			,769,47 ,644,94				91843 89922
2011		37,210.		_10	,044,54	*0.	Τ	0	09344
2 Total of line 1, column (d)						2		. 4	64548
3 Average distribution ratio for the 5- the foundation has been in existence	•	I on line 2 by 5,	or by the number	r of yea	ars	3		.0	92910
4 Enter the net value of noncharitable	e-use assets for 2016 from Part X	, line 5				4	8	3,547	<u>,632.</u>
5 Multiply line 4 by line 3						_ 5		7,762	<u>,410.</u>
6 Enter 1% of net investment income	(1% of Part I, line 27b)					6		7	,968.
7 Add lines 5 and 6	•					7		7,770	
8 Enter qualifying distributions from	Part XII, line 4					8		4,656	
If line 8 is equal to or greater than See the Part VI instructions.	•	ne 1b, and comp	lete that part usi	ng a 19	% tax rate.	<u> </u>			
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	990-PF (2016) LANDRY FAMILY FOUNDATION		29434		<u> </u>	age 4
Pa	rt VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4	948 -	see ins	truc	tions	<u>s) </u>
1a	Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1.	i				
	Date of ruling or determination letter: (attach copy of letter if necessary-see instructions)					
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here and enter 1%	1	ļ	1	5,9:	<u> 36.</u>
	of Part I, line 27b		1			
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	ļ			0.
3	Add lines 1 and 2	3		1	5,9:	<u> 36.</u>
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		1!	5,93	36.
6	Credits/Payments:					
а	2016 estimated tax payments and 2015 overpayment credited to 2016 6a 84,399	<u>.</u>				1
b	Exempt foreign organizations - tax withheld at source 6b					
C	Tax paid with application for extension of time to file (Form 8868)	_				ı
d	Backup withholding erroneously withheld 6d	. .				
7	Total credits and payments. Add lines 6a through 6d	7		84	1,39	99.
8	Enter any penalty for underpayment of estimated tax. Check here 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		68	3,40	63.
11	Enter the amount of line 10 to be: Credited to 2017 estimated tax	11				0.
Pa	rt VII-A Statements Regarding Activities					
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or interver	e in			Yes	
	any political campaign?			1a		_X_
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition	n)?		1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials publis	hed or				
	distributed by the foundation in connection with the activities		l.			_
c	Did the foundation file Form 1120-POL for this year?		L	10		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year-		ĺ			:
	(1) On the foundation. ▶ \$ 0 . (2) On foundation managers. ▶ \$	<u>. </u>		i		
е	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?		L	2		X
	If "Yes," attach a detailed description of the activities		I			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation,	or				_ ,
	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes			3		X
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?			4a	X	
b	If "Yes," has it filed a tax return on Form 990-T for this year?		L	4b	Х	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		į	5		X
	If "Yes," attach the statement required by General Instruction T					
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 of the state	te law	ļ			l
	remain in the governing instrument?		į	6	X_	<u> </u>
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 X	v		7	Х	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)			,		. .
	MA					
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate)]			
	of each state as required by General Instruction G? If "No," attach explanation			8b	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 call	lendar				Į .
	year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? If "Yes," complete Part XIV			9		X
10	Did any persons become substantial contributors during the tax year? If "Yes" attach a schedule listing their names and addresses			10		X
			For	m 99 0)-PF	(2016)

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Form 990-PF (2016) LANDRY FAMILY FOUNDATION			04-294340) 5 Page 6
Part VII-B Statements Regarding Activities for Which	Form 4720 May Be R	equired _{(contin}	ued)	
Part VII-B Statements Regarding Activities for Which 5a During the year did the foundation pay or incur any amount to: (1) Carry on propaganda, or otherwise attempt to influence legislation (sector (2) Influence the outcome of any specific public election (see section 4955); any voter registration drive? (3) Provide a grant to an individual for travel, study, or other similar purpose (4) Provide a grant to an organization other than a charitable, etc., organization 4945(d)(4)(A)? (see instructions) (5) Provide for any purpose other than religious, charitable, scientific, literary the prevention of cruelty to children or animals? b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify u section 53.4945 or in a current notice regarding disaster assistance (see instructions relying on a current notice regarding disaster assistance check c If the answer is "Yes" to question 5a(4), does the foundation claim exemption	on 4945(e))? or to carry on, directly or indirectly ss? on described in section y, or educational purposes, or former the exceptions described in uctions)? here from the tax because it maintain	ectly, Ye Ye Ye or Regulations	S X No S X No S X No S X No	ib
expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section 53 494 6a Did the foundation, during the year, receive any funds, directly or indirectly, to a personal benefit contract? b Did the foundation, during the year, pay premiums, directly or indirectly, on a If "Yes" to 6b, file Form 8870 7a At any time during the tax year, was the foundation a party to a prohibited tax b If "Yes," did the foundation receive any proceeds or have any net income attrib Part VIII Information About Officers, Directors, Trust Paid Employees, and Contractors	5-5(d) o pay premiums on personal benefit contract? shelter transaction? outable to the transaction?		es X No	b X
List all officers, directors, trustees, foundation managers and their	· commonantian		• -	
(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
KIMBERLY HOGAN GWINN-LANDRY	DIRECTOR		İ	
11 LEHIGH ROAD				_
WELLESLEY, MA 02482	2.00	0.	0.	<u> </u>
G. BARRIE LANDRY	DIRECTOR			
250 BOYLSTON ST, SUITE 6	- , ,,			0
BOSTON, MA 02116	2.00	0.	0.	0.
JENNIFER LANDRY LE	DIRECTOR			
5 MEADOWCROFT LANE GREENWICH, CT 06830	2.00	0.	0.	0.
2 Compensation of five highest-paid employees (other than those in		enter "NONE."	(4)	
(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
Total number of other employees paid over \$50,000			Form	0 990-PF (2016)

Form 990-PF (2016) LANDRY FAMILY FOUNDATION			43405 Page
Part:VIII Information About Officers, Directors, Trustees, Foundation Paid Employees, and Contractors (continued)		gers, Highly	
3 Five highest-paid independent contractors for professional services. If none, enter "	NONE."		
(a) Name and address of each person paid more than \$50,000		(b) Type of service	(c) Compensati
SARAH KATHLEEN GAUGER			
11 COLLEGE AVENUE, ARLINGTON, MA 02474	GRANT	COORDINATOR	149,080
Total number of others receiving over \$50,000 for professional services	-		•
Part IX-A Summary of Direct Charitable Activities	-		
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistic number of organizations and other beneficiaries served, conferences convened, research papers product N/A	cal information ced, etc.	n such as the	Expenses
3			
4			
Part X B. Summary of Program-Related Investments			
Describe the two largest program-related investments made by the foundation during the tax year on li N/A	nes 1 and 2.		Amount
2			
All other program-related investments See instructions.			
3			
Total Add lines 1 through 3			

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Form **990-PF** (2016)

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations	dation	s, see instructions)
$\overline{1}$	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
	Average monthly fair market value of securities	1a	39,238,059.
Ь	Average of monthly cash balances	1b	2,794,039.
c	Fair market value of all other assets	1¢	42,787,833.
d	Total (add lines 1a, b, and c)	1d	84,819,931.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	84,819,931.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	1,272,299.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	83,547,632.
6	Minimum investment return. Enter 5% of line 5	6	4,177,382.
Р	ant:XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations an foreign organizations check here ▶ ☐ and do not complete this part.)	d certai	n
1	Minimum investment return from Part X, line 6	1	4,177,382.
2a			
Ь	Tax on investment income for 2016 from Part VI, line 5 Income tax for 2016. (This does not include the tax from Part VI.) 2a 15,936. 40,818.		
C	Add lines 2a and 2b	2c	56,754.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	4,120,628.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	4,120,628.
6	Deduction from distributable amount (see instructions)	6	0.
7_	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	4,120,628.
P	art 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	4,656,090.
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	
þ	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	4,656,090.
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	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	4,656,090.
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation q	ualifies	for the section

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Part XIII Undistributed Income (s	ee instructions)			
	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI,				4,120,628.
2 Undistributed income, if any, as of the end of 2016				4,120,020.
a Enter amount for 2015 only		-	0.	
b Total for prior years				
g rotal for prior years		0.		
3 Excess distributions carryover, if any, to 2016:				
a From 2011 439,337.				
b From 2012 2,658,008.				
c From 2013				
d From 2014 2,116,935.				
e From 2015 1,345,862.	Į.			
f Total of lines 3a through e	6,560,142.			
4 Qualifying distributions for 2016 from				
Part XII, line 4. ► \$ 4,656,090.	1	Ì		
a Applied to 2015, but not more than line 2a	İ		0.	
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				4,120,628.
e Remaining amount distributed out of corpus	535,462.			
5 Excess distributions carryover applied to 2016	0.			0.
(If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below;		1	ĺ	
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	7,095,604.			
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	400 000	Ì		
not applied on line 5 or line 7	439,337.			
9 Excess distributions carryover to 2017.	((() () ()			
Subtract lines 7 and 8 from line 6a	6,656,267.			
10 Analysis of line 9:				
a Excess from 2012 2,658,008.				
b Excess from 2013			Ì	
c Excess from 2014 2,116,935. d Excess from 2015 1,345,862.				
		ļ	Į.	
e Excess from 2016 535, 462.	<u> </u>		_ 	

Form 990-PF (2016) LANDRY F. Part:XIV Private Operating Foundation	AMILY FOUN		II-A guestion 9)	N/A	4-2943405 P
1 a If the foundation has received a ruling or d				N/A	
foundation, and the ruling is effective for 2					
b Check box to indicate whether the foundation		_	in section	4942(j)(3) or	4942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year	g touridation accorded	Prior 3 years	10 12()/(0) 01	10 (2())(0)
income from Part I or the minimum	(a) 2016	(b) 2015	(c) 2014	(d) 2013	(e) Total
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				ļ	
d Amounts included in line 2c not			<u> </u>		
used directly for active conduct of					
exempt activities				ļ	
e Qualifying distributions made directly					
for active conduct of exempt activities.					
Subtract line 2d from line 2c			1	ł	ľ
3 Complete 3a, b, or c for the					
alternative test relied upon: a "Assets" alternative test - enter:				Į.	
(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				ł	
investment income (interest,					ľ
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				Ĭ	
section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from				\	
an exempt organization					
(4) Gross investment income	··· /o L		361)	1 05 000	
Part XVI Supplementary Inform			if the foundation	on had \$5,000 c	or more in assets
at any time during the		uctions.)			
1 Information Regarding Foundation	-				
a List any managers of the foundation who lead to the contributed moves the contribut			tributions received by	the foundation before	the close of any tax
, , , ,	ie tilali 40,000). (See si	oction 507 (d)(2).)			
NONE	400/		/		
b List any managers of the foundation who other entity) of which the foundation has a		•	(or an equally large po	ertion of the ownershi	p of a partnership or
• •	1070 of grouter interes				
NONE	0:41.	O-balamakan ata E			
2 Information Regarding Contribution Check here if the foundation onl			_	na mat account umpalier	tod raquagta for funda. If
the foundation makes gifts, grants, etc. (si			•	• •	
a The name, address, and telephone numbe			·		
SARAH GAUGER, 781-325					
11 COLLEGE AVENUE, AR					
b The form in which applications should be STANDARD PRINTED			should include:		
c Any submission deadlines: NONE				 :	
	cuch ac hu aggaranh	il argae, charitable field	kinds of institutions	or other factors:	
d Any restrictions or limitations on awards, TOTAL FUNDS OF THE FO		u areas, charitadie tield:	, killus of institutions,	or other factors:	
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Pa	Supplementary Information	continued)			
3	Grants and Contributions Paid During the Yea	ar or Approved for Future F	ayment		
	Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
_	Name and address (home or business)	any foundation manager or substantial contributor	recipient	contribution	Amount
а	Paid during the year				
SEE	ATTACHED SCHEDULE		NOT RELATED	EXEMPT PURPOSE	4,471,913.
					4,4/1,515.
			:		
				ļ	
	Total	<u> </u>		► 3a	4,471,913.
b	Approved for future payment				
	NONE				
		<u> </u>			
		-			

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Total

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Part XVI-A Analysis of Income-Prod	ucing Activities	S			
Enter gross amounts unless otherwise indicated.	Unrelated b (a) Business	usiness income (b)	Excluded	d by section 512, 513, or 514	(e) Related or exempt
1 Program service revenue:	Business code	Amount	sion code	Amount	function income
a	-	_	+		
b	_		+		
c	_		++		
d			+		
e	_		+		
f	_		+		
g Fees and contracts from government agencies	<u> </u>		+++		
2 Membership dues and assessments	-		+		
3 Interest on savings and temporary cash	1 1		1 1	İ	
investments			1 4	1 100 005	
4 Dividends and interest from securities			14	1,498,985.	
5 Net rental income or (loss) from real estate:		·	+		
a Debt-financed property					
b Not debt-financed property	<u> </u>				
6 Net rental income or (loss) from personal					
property	<u> </u>		1 1 1	150 554	
7 Other investment income			18	179,674.	
8 Gain or (loss) from sales of assets other				256 254	
than inventory	ļ		18	<256,051.>	
9 Net income or (loss) from special events	<u> </u>				
10 Gross profit or (loss) from sales of inventory	<u> </u>		+		
11 Other revenue					
a	-				
b	_			+	
C	_				
d	-			 +	
e	_			1 400 600	
12 Subtotal. Add columns (b), (d), and (e)	<u> </u>	0	<u>. </u>	1,422,608.	0.
13 Total. Add line 12, columns (b), (d), and (e)				13	1,422,608.
(See worksheet in line 13 instructions to verify calculations.)				
Part XVI-B Relationship of Activities	to the Accom	plishment of E	xempt P	urposes	
		-1 (-) (D +) 0 (1	A	- 4	
Explain below how each activity for which in the foundation's exempt purposes (other than the foundation).	•	, ,	-A contribut	еа ипрогалиу ю иле ассотр	usnment of
the foundation's exempt purposes (other tha	an by providing funds	Tor Such purposes).			
					
					
					
	-				
					

Form **990-PF** (2016)

623621 11-23-16

Form 990	-PF (20		Y FAMILY				04-294		Pa	ge 13
Part X		Information Re Exempt Organi		sfers To ar	nd Transactions a	nd Relations	nips With Nonchar	itable		
1 Did	the org	anization directly or indir	rectly engage in any	of the following	with any other organizatio	n described in sect	tion 501(c) of		Yes	No
					, relating to political organi					
		rom the reporting founda								
(1)	Cash							1a(1)		X
	Other a	assets						1a(2)		X
b Othe	er trans	actions;								, .
(1)	Sales	of assets to a noncharital	ble exempt organizat	tion				1b(1)		X
(2)	Purcha	ises of assets from a nor	ncharitable exempt o	rganization				1b(2)		Х
(3)	Rental	of facilities, equipment,	or other assets					1b(3)		X
(4)	Reimb	ursement arrangements						1b(4)		X
(5)	Loans	or loan guarantees						1b(5)		Х
(6)	Perfor	mance of services or me	mbership or fundrais	sıng solicitation	S			1b(6)		Х
c Sha	ring of	facilities, equipment, ma	iling lists, other asse	ets, or paid emp	loyees			1c		X
d If th	e answ	er to any of the above is	"Yes," complete the	following sched	lule Column (b) should alv	ways show the fair	market value of the goods,	other ass	sets,	
		given by the reporting for the value of the goods,			d less than fair market valu	e ın any transactıor	n or sharing arrangement, s	how in		
(a) Line no	1	b) Amount involved			exempt organization	(d) Description	n of transfers, transactions, and	sharing arr	angemer	nts
1-7	 	-,	(-, -	N/A		1				
	\top			21, 22						
	\top				-					
	1									
			-							
					-					
					<u> </u>					
	1									
	1			-						
		-			" -					
ın s	ection !	dation directly or indirec 501(c) of the Code (other mplete the following sch	r than section 501(c		or more tax-exempt organi on 527?	zations described	[Yes	X] No
		(a) Name of org			(b) Type of organization		(c) Description of relations	ship		
		N/A								
						-				
				-		 				
										
	Under	penalties of perjury, I declare	that I have examined this	s return, including a	accompanying schedules and st	atements, and to the b	est of my knowledge			
Sign Here	and be	ief, it is true, correct, and con	nplete Declaration of pro	eparer (other than t	taxpayer) is based on all informa	DIREC	re sh	ay the IRS turn with the lown below X Yes	ne prepar v (see ins	er
	Sign	ature of officer or trustee		T	Date	Title				
		Print/Type preparer's na	ame	Preparer's si	gnature	Date	Check if PTIN self- employed			
Paid		HILLARY BU	RR, CPA	M.), coa	11/9/2017	P0	0910	379	
Prepa	arer	Firm's name ► WOL		MX P.			Firm's EIN ► 04-2			

Phone no. 617-439-9700 Form **990-PF** (2016)

Firm's address > 99 HIGH STREET, 21ST FLOOR BOSTON, MA 02110

04-2943405	PAGE	1	OF	
CONTINUATION	FOR 990	-PF,	PART	1

(a) List and 2-story br	(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.				(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a CAPITAL GAIN (1		D - Donation				
b CAPITAL GAIN D				P		-
	VESTMENTS - ST GA	INS			01/01/16	12/31/16
					01/01/15	12/31/16
	VESTMENTS - 1231			P	<u> </u>	
f PARTNERSHIP IN				-		
9				· · · · · · · · · · · · · · · · · · ·		
h		· · · · ·				
1					<u></u>	
k						
m						
n						
0						
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		(h) (e) p	Gain or (loss) lus (f) minus (g)	
a <1,056,086.>						56,086.>
b 171,229.						171,229.
						393,027.
d 393,027.						104,109.
ε <52.>						<52.>
<u>f</u> 131,722.						131,722.
9			L.,	<u> </u>	<u></u> _	
<u>h</u>			<u> </u>			
1			↓			
			╄			
<u>k</u>		<u> </u>	┿			
<u></u>			├ ─			
<u>m</u>			∔			
n			+-			
Complete only for accets chowin	I IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	ne foundation on 12/21/60	+	40.1.00	(fun (h))	
Complete only for assets shown			+		ses (from col. (h)) of col. (h) gain ovei	col. (k).
(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	}	but n	ot less than "-0-")	Jon (11),
2		· · · · · · · · · · · · · · · · · · ·	+-		<1 0	56,086.>
<u>a</u> b			+-			171,229.
c				-		393,027.
d			1			104,109.
e					-	<52.>
f						131,722.
g						
h						
k			1_	_		
1			<u> </u>			
<u>m</u>	ļ	·	↓			
<u>n</u>	ļ	_	↓			
0			+-			
2 Capital gain net income or (net ca	apital loss) { If gain, also enter If (loss), enter "-0	ın Part I, line 7 -" ın Part I, line 7	2		<2	56,051.>
If gain, also enter in Part I, line 8,	ss) as defined in sections 1222(5) and , column (c).					
If (loss), enter "-0-" in Part I, line	8	J	3		<u>N</u> /A	

FORM 990-PF	DIVIDENDS	AND INTER	EST	FROM SECU	RITIES S	TATEMENT 1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDEND		(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	
ACCRUED INTEREST						
PAID ACCRUED INTEREST PAID - U.S.	<33,440.>		0.	<33,440.	> <33,440.	•
INTEREST	<5,152.>		0.	<5,152.	> <5,152.	>
BOND PREMIUM BOND PREMIUM - TAX-EXEMPT	<6,710.>		0.	<6,710.	> <6,710.3	>
INTEREST BOND PREMIUM -	<2,320.>		0.	<2,320.	> <2,320.3	>
U.S. INTEREST	<190.>		0.	<190.		>
DIVIDENDS	1,126,204.		0.		1,126,204.	
INTEREST ORIGINAL ISSUE	362,806.		0.	362,806	. 362,806.	
DISCOUNT ORIGINAL ISSUE DISCOUNT - U.S.	601.		0.	601	. 601.	
INTEREST TAX-EXEMPT	1,250.		0.	1,250	1,250.	
INTEREST	6,300.		0.	6,300	6,300.	
U.S. INTEREST	49,636.		0.	49,636	49,636.	
TO PART I, LINE 4	1,498,985.		0.	1,498,985	1,498,985.	
FORM 990-PF	-w2ii	OTHER I	NCO:	 ME	S	TATEMENT 2
				(A) VENUE	(B) NET INVEST-	(C) ADJUSTED
DESCRIPTION					MENT INCOME	NET INCOME
PARTNERSHIP INVESTI INCOME PARTNERSHIP INVESTI				179,669. 5.	179,669. 5.	
TOTAL TO FORM 990-1	PF, PART I, I	LINE 11		179,674.	179,674.	
		=				

FORM 990-PF	LEGAL	FEES	S'	ratement 3
. DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	2,570.	0.		2,570.
TO FM 990-PF, PG 1, LN 16A =	2,570.	0.		2,570.
FORM 990-PF	ACCOUNTING FEES		STATEMENT 4	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	31,000.	0.		31,000.
TO FORM 990-PF, PG 1, LN 16B	31,000.	0.		31,000.
FORM 990-PF C	THER PROFES	SIONAL FEES	S	FATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT FEES SARAH K. GAUGER	205,123. 149,080.	205,123.		0. 149,080.
TO FORM 990-PF, PG 1, LN 16C	354,203.	205,123.		149,080.
FORM 990-PF	RM 990-PF TAXES		STATEMENT 6	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
COMMONWEALTH OF MASSACHUSETTS FOREIGN TAXES	4,000. 23,008. 84,500.	0. 23,008. 0.		0. 0. 0.
IRS STATE WITHHOLDING	82.	82.		0.

FORM 990-PF	OTHER E	XPENSES	STATEMENT 7		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
PARTNERSHIP INVESTMENTS - OTHER DEDUCTIONS PARTNERSHIP INVESTMENTS -	397,307.	397,307.		0.	
CHARITABLE CONTRIBUTIONS PIERCE CONWAY DESIGN MA FILING FEE	52. 975. 500.	0. 0. 0.		52. 975. 500.	
TO FORM 990-PF, PG 1, LN 23	398,834.	397,307.		1,527.	

FORM 990-PF OTHER INCREASES IN NET	ASSETS OR FU	ND BALANCES	STATEMENT 8
DESCRIPTION			AMOUNT
UNREALIZED GAIN/LOSS REALIZED GAIN/LOSS ACCOUNTING ADJUSTMENT - BEGINNING BAI	LANCE SHEET		3,702,000. 256,051. 2,521,789.
TOTAL TO FORM 990-PF, PART III, LINE	3		6,479,840.
FORM 990-PF CORPO	DRATE STOCK		STATEMENT 9
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
SECURITIES		39,426,251.	39,426,251.
TOTAL TO FORM 990-PF, PART II, LINE 1	10B	39,426,251.	39,426,251.
FORM 990-PF OTHER	INVESTMENTS		STATEMENT 10
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
ALTERNATIVE INVESTMENTS	FMV	44,366,032.	44,366,032.

44,366,032. 44,366,032.

TOTAL TO FORM 990-PF, PART II, LINE 13