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Form 990-PF

Department of the Treasury
Internal Revenue Service

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

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Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2016

Open to Public Inspection

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

Name of foundation
MAZAR FAMILY CHARITABLE FOUNDATION TRUST

Number and street (or P O box number if mail is not delivered to street address)
C/O THE COLONY GROUP 2 ATLANTIC AVE

City or town, state or province, country, and ZIP or foreign postal code
BOSTON, MA 02110

G Check all that apply

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

H Check type of organization

☒ Section 501(c)(3) exempt private foundation

☐ Section 4947(a)(1) nonexempt charitable trust

☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 12,993,662

J Accounting method

☒ Cash

☐ Accrual

☐ Other (specify) (Part I, column (d) must be on cash basis)

A Employer identification number
04-3344681

B Telephone number (see instructions)
(617) 723-8200

C If exemption application is pending, check here

D 1. Foreign organizations, check here

2. Foreign organizations meeting the 85% test, check here and attach computation

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

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

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)			
	2 Check if the foundation is not required to attach Sch B			
	3 Interest on savings and temporary cash investments	13	13	
	4 Dividends and interest from securities	33,394	33,394	
	5a Gross rents			
	b Net rental income or (loss)			
	6a Net gain or (loss) from sale of assets not on line 10	731,012		
	b Gross sales price for all assets on line 6a	1,562,094		
	7 Capital gain net income (from Part IV, line 2)		1,116,235	
	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 Total. Add lines 1 through 11	764,419	1,149,642		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0	0	0
	14 Other employee salaries and wages			
	15 Pension plans, employee benefits			
	16a Legal fees (attach schedule)	14,715	0	14,715
	b Accounting fees (attach schedule)			
	c Other professional fees (attach schedule)	26,799	14,299	12,500
	17 Interest			
	18 Taxes (attach schedule) (see instructions)	30,765	862	0
	19 Depreciation (attach schedule) and depletion			
	20 Occupancy			
	21 Travel, conferences, and meetings			
	22 Printing and publications			
	23 Other expenses (attach schedule)	39	4	0
	24 Total operating and administrative expenses. Add lines 13 through 23	72,318	15,165	27,215
	25 Contributions, gifts, grants paid	325,075		325,075
	26 Total expenses and disbursements. Add lines 24 and 25	397,393	15,165	352,290
	27 Subtract line 26 from line 12			
	a Excess of revenue over expenses and disbursements	367,026		
	b Net investment income (if negative, enter -0-)		1,134,477	
c Adjusted net income (if negative, enter -0-)				

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form 990-PF (2016)

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing			
	2 Savings and temporary cash investments	1,574,867	1,812,223	1,812,223
	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)	126,511	121,625	7,146,025
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment basis ▶ _____ 2,000,000 Less accumulated depreciation (attach schedule) ▶ _____	1,500,000	2,000,000	2,000,000
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	1,700,588	1,819,566	2,035,414
	14 Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	4,901,966	5,753,414	12,993,662	
Liabilities	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 Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	4,901,966	5,753,414	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0	0	
	29 Retained earnings, accumulated income, endowment, or other funds	0	0	
30 Total net assets or fund balances (see instructions)	4,901,966	5,753,414		
31 Total liabilities and net assets/fund balances (see instructions) .	4,901,966	5,753,414		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	4,901,966
2 Enter amount from Part I, line 27a	2	367,026
3 Other increases not included in line 2 (itemize) ▶ _____	3	498,922
4 Add lines 1, 2, and 3	4	5,767,914
5 Decreases not included in line 2 (itemize) ▶ _____	5	14,500
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	5,753,414

Part IV Capital Gains and Losses for Tax on Investment Income

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

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

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

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	1,116,235
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 { }	3	

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

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2015	235,934	12,509,624	0 018860
2014	556,335	11,633,105	0 047823
2013	537,918	11,089,153	0 048508
2012	514,257	10,228,114	0 050279
2011	315,469	10,654,863	0 029608
2 Total of line 1, column (d)			2 0 195078
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years			3 0 039016
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5			4 13,545,448
5 Multiply line 4 by line 3			5 528,489
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 11,345
7 Add lines 5 and 6			7 539,834
8 Enter qualifying distributions from Part XII, line 4			8 852,290

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	1	11,345
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	11,345
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	11,345
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	0
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	340
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed ▶	9	11,685
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid ▶	10	
11	Enter the amount of line 10 to be Credited to 2017 estimated tax ▶ Refunded ▶	11	

Part VII-A Statements Regarding Activities

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

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).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	Yes	
14	The books are in care of ► STEPHEN T SADLER Telephone no ► (617) 723-8200			

Located at **►** 2 ATLANTIC AVENUE BOSTON MA ZIP+4 **►** 02110

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			
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? See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). If "Yes," enter the name of the foreign country ►	16	Yes	No

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? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? ☐ Organizations relying on a current notice regarding disaster assistance check here. ► ☐	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016? ☐	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? ☐ Yes ☒ No If "Yes," list the years ► 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions). ☐	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016). ☐	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2016?	4b		No

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

5a During the year did the foundation pay or incur any amount to (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). ☐ Yes ☒ No (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No b If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? ☐ Yes ☒ No Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐ c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No If "Yes," attach the statement required by Regulations section 53.4945–5(d)	5b		
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? ☐ Yes ☒ No If "Yes" to 6b, file Form 8870	6b		No
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? ☐ Yes ☒ No	7b		

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
BRIAN MAZAR 50 PLEASANT STREET MENDON, MA 01756	TRUSTEE 1 00	0	0	0
ANNE MAZAR 50 PLEASANT STREET MENDON, MA 01756	TRUSTEE 1 00	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	Title, and average hours per week (b) devoted to position	(c) Compensation	Contributions to employee benefit plans and deferred compensation (d)	Expense account, (e) other allowances
NONE				
Total number of other employees paid over \$50,000.				0

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0

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	9,986,611
b	Average of monthly cash balances.	1b	1,765,113
c	Fair market value of all other assets (see instructions).	1c	2,000,000
d	Total (add lines 1a, b, and c).	1d	13,751,724
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	13,751,724
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	206,276
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	13,545,448
6	Minimum investment return. Enter 5% of line 5.	6	677,272

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	677,272
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	11,345
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	11,345
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	665,927
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	665,927
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	665,927

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	352,290
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	500,000
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	852,290
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	11,345
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	840,945

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI, line 7				665,927
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only.			526,001	
b Total for prior years 20____, 20____, 20____		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 ▶ \$ <u>852,290</u>				
a Applied to 2015, but not more than line 2a			526,001	
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.				326,289
e Remaining amount distributed out of corpus	0			
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	0			
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 instructions.			0	
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017.				339,638
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 (see instructions). . . .	0			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a.	0			
10 Analysis of line 9				
a Excess from 2012.				
b Excess from 2013.				
c Excess from 2014.				
d Excess from 2015.				
e Excess from 2016.				

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

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

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

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

	Tax year	Prior 3 years			(e) Total
	(a) 2016	(b) 2015	(c) 2014	(d) 2013	
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					

3 Complete 3a, b, or c for the alternative test relied upon

a "Assets" alternative test—enter

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.

c "Support" alternative test—enter

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).

(3) Largest amount of support from an exempt organization

(4) Gross investment income

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

1 Information Regarding Foundation Managers:

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

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

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

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

a The name, address, and telephone number or email 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	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
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			3a	325,075
b <i>Approved for future payment</i>				
Total			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2016)

Part XVII

- | | Yes | No |
|-------|-----|----|
| 1a(1) | | No |
| 1a(2) | | No |
| 1b(1) | | No |
| 1b(2) | | No |
| 1b(3) | | No |
| 1b(4) | | No |
| 1b(5) | | No |
| 1b(6) | | No |
| 1c | | No |

[illegible]

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

- b** If "Yes," complete the following schedule

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

**Sign
Here**

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

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

**Paid
Preparer
Use Only**

Print/Type preparer's name CHERYL L STELLJES	Preparer's Signature	Date 2017-05-12	Check if self-employed ☐	PTIN P00472152
Firm's name ► THE COLONY GROUP LLC				Firm's EIN ► 90-0751149
Firm's address ► 2 ATLANTIC AVENUE BOSTON, MA 02110				Phone no (617) 723-8200

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

List and describe the kind(s) of property sold (e g , real estate, (a) 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)
BANCO SANTANDER CENTRAL HISPANO SA	P	2015-06-10	2016-07-05
3,500 SHS WATERS CORP	P	2007-05-03	2016-09-22
3,000 SHS WATERS CORP	P	2007-05-03	2016-09-22
WESTFIELD CAP LARGE CAP GROWTH	P	2015-12-30	2016-02-23
WESTFIELD CAP LARGE CAP GROWTH	P	2012-08-20	2016-02-23
WESTFIELD CAP LARGE CAP GROWTH	P	2011-10-13	2016-02-23
KONINKLIJKE PHILIPS ELECTRONICS	P	2015-06-10	2016-07-05
CAPITAL GAINS DIVIDENDS	P		

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
4		11	-7
551,167		2,765	548,402
473,750		2,370	471,380
88,312		96,151	-7,839
303,439		299,578	3,861
58,234		44,973	13,261
9		11	-2
87,179			87,179

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(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	
			-7
			548,402
			471,380
			-7,839
			3,861
			13,261
			-2
			87,179

Form 990PF Part XV Line 1a - 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).

BRIAN MAZAR
ANNE MAZAR

Form 990FP Part XV Line 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
Name and address (home or business)				
a Paid during the year				
350ORG 20 JAY ST BROOKLYN, NY 11201		PUBLIC	GENERAL	3,000
AMERICAN INDIAN COLLEGE FUND 8333 GREENWOOD BLVD DENVER, CO 80221		EDUCATIONAL	GENERAL	7,500
AMERICAN RED CROSS 274 TREMONT ST BOSTON, MA 02116		PUBLIC	GENERAL	2,000
ANIMAL WELFARE INSTITUTE 900 PENNSYLVANIA AVE SE WASHINGTON, DC 20003		PUBLIC	GENERAL	5,000
BEREA COLLEGE 101 CHESTNUT ST BEREA, KY 40403		EDUCATIONAL	GENERAL	1,750
BETTER BUSINESS BUREAU 290 DONALD LYNCH BLVD MARLBOROUGH, MA 01752		PUBLIC	GENERAL	100
BIODIVERSITY WORKS PO BOX 557 EDGARTOWN, MA 02539		PUBLIC	GENERAL	10,000
BIODYNAMIC FARMLAND CONSERVATION TRUST 24 HULST ROAD AMHERST, MA 01002		PUBLIC	GENERAL	300
BLACKSTONE RIVER WATERSHED ASSN 271 OAK ST UXBRIDGE, MA 01569		PUBLIC	GENERAL	200
CARE 151 ELLIS ST NE ATLANTA, GA 30303		PUBLIC	GENERAL	12,000
CARTER CENTER 453 FREEDOM PKWY ATLANTA, GA 30307		PUBLIC	GENERAL	4,000
CENTER FOR BIOLOGICAL DIVERSITY PO BOX 710 TUCSON, AZ 85702		PUBLIC	GENERAL	5,000
CHARITY NAVIGATOR 139 HARRISTOWN RD GLEN ROCK, NJ 07452		PUBLIC	GENERAL	100
CHARITY WATCH 3450 NORTH LAKE SHORE DR CHICAGO, IL 60657		EDUCATIONAL	GENERAL	100
COMMUNITY HARVEST PROJECT 37 WHEELER RD NORTH GRAFTON, MA 01536		PUBLIC	GENERAL	500
Total ►				325,075
3a				

Form 990FP Part XV Line 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
Name and address (home or business)				
a <i>Paid during the year</i>				
DOCTORS WITHOUT BORDERS 333 7TH AVE NEW YORK, NY 10001		PUBLIC	GENERAL	7,000
EARTHJUSTICE LEGAL DEFENSE 50 CALIFORNIA ST SAN FRANCISCO, CA 94111		PUBLIC	GENERAL	4,000
ENVIRONMENTAL DEFENSE FUND 18 TREMONT ST BOSTON, MA 02108		PUBLIC	GENERAL	4,000
FAMILY CARE INTERNATIONAL 45 BROADWAY NEW YORK, NY 10006		PUBLIC	GENERAL	12,000
FEEDING AMERICA 35 EAST WACKER DRIVE CHICAGO, IL 60601		PUBLIC	GENERAL	8,000
GREAT POND FOUNDATION 1 NORTH WATER ST EDGARTOWN, MA 02539		PUBLIC	GENERAL	4,000
HABITAT FOR HUMANITY INTERNATIONAL 121 HABITAT ST AMERICUS, GA 31709		PUBLIC	GENERAL	6,500
HUMAN RIGHTS WATCH 350 FIFTH AVE NEW YORK, NY 10118		PUBLIC	GENERAL	2,000
HUMANE FARMING ASSOCIATION PO BOX 3577 SAN RAFAEL, CA 94912		PUBLIC	GENERAL	4,000
HUMANE SOCIETY OF UNITED STATES 1255 23RD STREET NW WASHINGTON, DC 20037		PUBLIC	GENERAL	2,500
INTERNATIONAL PLANNED PARENTHOOD 125 MAIDEN LANE NEW YORK, NY 10038		PUBLIC	GENERAL	12,000
INTERNATIONAL RESCUE COMMITTEE 122 EAST 42ND ST NEW YORK, NY 10168		PUBLIC	GENERAL	6,500
ISLAND GROWN INITIATIVE PO BOX 622 VINEYARD HAVEN, MA 02568		PUBLIC	GENERAL	1,500
ISLAND HOUSING TRUST 346 STATE ROAD VINEYARD HAVEN, MA 02568		PUBLIC	GENERAL	5,000
JANE GOODALL INSTITUTE 1595 SPRING HILL RD VIENNA, VA 22182		PUBLIC	GENERAL	2,000
Total ► 3a				325,075

Form 990PF Part XV Line 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
Name and address (home or business)				
a <i>Paid during the year</i>				
MAPLE FARM SANCTUARY 101 NORTH AVENUE MENDON, MA 01756		PUBLIC	GENERAL	2,500
MASSACHUSETTS AUDUBON SOCIETY 6 BEACON ST BOSTON, MA 02108		PUBLIC	GENERAL	2,000
MASSACHUSETTS EYE & EAR 800 HUNTINGTON AVE BOSTON, MA 02115		PUBLIC	GENERAL	5,000
MASSACHUSETTS FARM BUREAU PRESERVATION FOUNDATION 249 LAKESIDE AVE MARLBOROUGH, MA 01752		PUBLIC	GENERAL	50
METACOMET LAND TRUST PO BOX 231 FRANKLIN, MA 02038		PUBLIC	GENERAL	1,000
MSPCC 99 SUMMER ST BOSTON, MA 02110		PUBLIC	GENERAL	1,000
NATURE CONSERVANCY 4245 NORTH FAIRFAX DR ARLINGTON, VA 22203		PUBLIC	GENERAL	105,000
NEW ENGLAND WILDFLOWER SOCIETY 180 HEMENWAY RD FRAMINGHAM, MA 01701		PUBLIC	GENERAL	2,500
PAP CORPS CHAMPIONS FOR CANCER RESEARCH 3848 FAU BLVD BOCA RATON, FL 33431		PUBLIC	GENERAL	300
PATHFINDER INTERNATIONAL 9 GALEN ST WATERTOWN, MA 02472		PUBLIC	GENERAL	12,000
RAINFOREST ACTION NETWORK 425 BUSH ST SAN FRANCISCO, CA 94108		PUBLIC	GENERAL	500
RAINFOREST ALLIANCE 233 BROADWAY NEW YORK, NY 10279		PUBLIC	GENERAL	4,000
SAVE THE CHILDREN 54 WILTON RD WESTPORT, CT 06880		PUBLIC	GENERAL	12,000
STUDENT CONSERVATION ASSOCIATION 4245 NORTH FAIRFAX DR ARLINGTON, VA 22203		PUBLIC	GENERAL	3,500
TECHNOSERVE 1120 19TH ST NW WASHINGTON, DC 20036		PUBLIC	GENERAL	4,000
Total ▶ 3a				325,075

Form 990PF Part XV Line 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
Name and address (home or business)				
a <i>Paid during the year</i>				
THE DRUM WORKSHOP 37 MEETING HOUSE WAY EDGARTOWN, MA 02539		PUBLIC	GENERAL	2,500
THE VINEYARD ENERGY PROJECT 1085 STATE RD WEST TISBURY, MA 02568		PUBLIC	GENERAL	500
TISBEST PHILANTHROPY 13751 LAKE CITY WAY NE SEATTLE, WA 98125		PUBLIC	GENERAL	375
TRUSTEES OF RESERVATIONS 464 ABBOTT AVENUE LEOMINSTER, MA 01453		PUBLIC	GENERAL	5,000
UNICEF 125 MAIDEN LANE NEW YORK, NY 10038		PUBLIC	GENERAL	8,000
UNION OF CONCERNED SCIENTISTS 2 BRATTLE SQ CAMBRIDGE, MA 02138		PUBLIC	GENERAL	4,000
VERMONT COMMUNITY GARDEN NETWORK 12 NORTH ST BURLINGTON, VT 05401		PUBLIC	GENERAL PURPOSE	300
WBUR BOSTON UNIVERSITY 890 COMMONWEALTH AVENUE BOSTON, MA 02215		PUBLIC	GENERAL	7,500
WGBH-TV ONE GUEST ST BOSTON, MA 02135		PUBLIC	GENERAL	7,500
WOODS HOLE OCEANOGRAPHIC INSTITUTE 86 WATER ST WOODS HOLE, MA 02543		PUBLIC	EDUCATIONAL	1,000
ZGIRLS 500 YALE AVENUE NORTH SEATTLE, WA 98109		PUBLIC	GENERAL	500
Total ▶ 3a				325,075

TY 2016 Investments Corporate Stock Schedule**Name:** MAZAR FAMILY CHARITABLE FOUNDATION TRUST**EIN:** 04-3344681

Name of Stock	End of Year Book Value	End of Year Fair Market Value
WATERS CORP., 51,951 SHS	41,041	6,981,695
CONSOLIDATED EDISON INC - 400 SHS	14,832	29,472
MARATHON OIL CORP - 133 SHS	2,572	2,302
PAYCHEX INC - 770 SHS	21,229	46,878
SCHLUMBERGER LTD - 267 SHS	16,092	22,415
FASTENAL CO - 266 SHS	4,619	12,497
SEI INVESTMENTS CO - 800 SHS	14,800	39,488
BANCO SANTANDER SA ADR - 514 SHS	921	2,688
KONINKLIJKE PHILIPS ELECTRS ADR - 272 SHS	5,519	8,590

TY 2016 Investments - Other Schedule**Name:** MAZAR FAMILY CHARITABLE FOUNDATION TRUST**EIN:** 04-3344681

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
TRP NEW ERA FUND	AT COST	11,944	10,519
TRP INT'L STOCK FUND	AT COST	4,356	6,467
AMER FDS EUROPACIFIC GROWTH FD	AT COST	293,130	318,139
AMER FDS SMALL CAP WORLD FUND	AT COST	470,010	540,790
WESTFIELD CAPITAL LARGE-CAP GROWTH FD	AT COST	469,510	565,047
PORTFOLIO 21 GLOBAL EQUITY FUND	AT COST	106,662	97,250
VANGUARD DIVIDEND GROWTH FUND	AT COST	463,954	497,202

TY 2016 Legal Fees Schedule**Name:** MAZAR FAMILY CHARITABLE FOUNDATION TRUST**EIN:** 04-3344681

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	14,715	0		14,715

TY 2016 Other Decreases Schedule

Name: MAZAR FAMILY CHARITABLE FOUNDATION TRUST

EIN: 04-3344681

Description	Amount
CHECKS WRITTEN IN 2015, CLEARED IN 2016	14,500

TY 2016 Other Expenses Schedule**Name:** MAZAR FAMILY CHARITABLE FOUNDATION TRUST**EIN:** 04-3344681**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MASSACHUSETTS FILING FEE	35	0		0
INVESTMENT EXPENSES	4	4		0

TY 2016 Other Increases Schedule**Name:** MAZAR FAMILY CHARITABLE FOUNDATION TRUST**EIN:** 04-3344681

Description	Amount
CHECKS OUTSTANDING AT YEAR END	113,690
DIFFERENCE BETW FMV AND COST BASIS ON SALE OF DONATED STOCK	385,223
BASIS ADJUSTMENT BANCO SANTANDER - WASH SALE RULE	9

TY 2016 Other Professional Fees Schedule**Name:** MAZAR FAMILY CHARITABLE FOUNDATION TRUST**EIN:** 04-3344681

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ASSET MANAGEMENT FEES	14,299	14,299		0
BROKER FEES	12,500	0		12,500

TY 2016 Taxes Schedule**Name:** MAZAR FAMILY CHARITABLE FOUNDATION TRUST**EIN:** 04-3344681

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX PAYMENTS	862	862		0
2015 FEDERAL EXCISE TAX	29,903	0		0