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

Name of foundation BILEZIKIAN FAMILY FOUNDATION INC		A Employer identification number 04-3504021	
Number and street (or P O box number if mail is not delivered to street address) 231 WILLOW STREET		B Telephone number (see instructions) (508) 375-0005	
City or town, state or province, country, and ZIP or foreign postal code YARMOUTHPORT, MA 026751744		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 20,190,052		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)			

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)	534,729			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities . . .	460,384	460,384		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-67,930			
	b Gross sales price for all assets on line 6a 5,096,655				
	7 Capital gain net income (from Part IV, line 2) . . .		0		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	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	927,183	460,384		
	13 Compensation of officers, directors, trustees, etc	95,000	0		95,000
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	1,000	0		1,000
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)	109,690	109,690		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	7,619	0		7,619
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings	36,487	0		36,487
	22 Printing and publications				
	23 Other expenses (attach schedule)	14,061	0		14,061
	24 Total operating and administrative expenses. Add lines 13 through 23	263,857	109,690		154,167
	25 Contributions, gifts, grants paid	736,841			736,841
	26 Total expenses and disbursements. Add lines 24 and 25	1,000,698	109,690		891,008
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-73,515			
	b Net investment income (if negative, enter -0-)		350,694		
c Adjusted net income(if negative, enter -0-) . . .					

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)			
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	253,845	40,657	40,657
	3	Accounts receivable ▶ <u>426</u>			
		Less allowance for doubtful accounts ▶ _____		426	426
	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)			
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ _____			
	Less accumulated depreciation (attach schedule) ▶ _____				
12	Investments—mortgage loans				
13	Investments—other (attach schedule)	20,007,923	20,130,646	20,148,969	
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)	20,261,768	20,171,729	20,190,052	
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 <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	17,432,038	17,432,038	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	2,829,730	2,739,691	
	30	Total net assets or fund balances (see instructions)	20,261,768	20,171,729	
31	Total liabilities and net assets/fund balances (see instructions) .	20,261,768	20,171,729		

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	20,261,768
2	Enter amount from Part I, line 27a	2	-73,515
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	20,188,253
5	Decreases not included in line 2 (itemize) ▶ _____	5	16,524
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	20,171,729

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	-67,930
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	891,581	19,602,535	0 045483
2014	952,082	19,674,081	0 048393
2013	1,021,386	19,911,522	0 051296
2012	929,094	18,889,371	0 049186
2011	997,308	18,219,718	0 054738
2 Total of line 1, column (d)			2 0 249096
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 049819
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5			4 19,695,314
5 Multiply line 4 by line 3			5 981,201
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 3,507
7 Add lines 5 and 6			7 984,708
8 Enter qualifying distributions from Part XII, line 4 ,			8 891,008

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	7,014
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	7,014
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	7,014
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	10,829
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	10,829
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	3,815
11	Enter the amount of line 10 to be Credited to 2017 estimated tax <input type="checkbox"/> 3,815 Refunded <input type="checkbox"/>	11	0

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	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 <input type="checkbox"/> \$ _____ 0 (2) On foundation managers <input type="checkbox"/> \$ _____ 0		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____ 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) <input type="checkbox"/> 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		
14	The books are in care of ▶ LAKE STREET ADVISORS LLC Telephone no ▶ (603) 610-4122			

Located at ▶ 25 CHESTNUT STREET PORTSMOUTH NH ZIP+4 ▶ 03801

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ <input type="checkbox"/>	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?	16	Yes	No
See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). If "Yes," enter the name of the foreign country ▶				

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

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

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 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)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. ▶ <input type="checkbox"/>	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? <input type="checkbox"/>	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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). <input type="checkbox"/>	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016). <input type="checkbox"/>	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))? <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 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Organizations relying on a current notice regarding disaster assistance check here. ▶ <input type="checkbox"/> 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? <input type="checkbox"/> Yes <input type="checkbox"/> No <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</i>	5b		
6a 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 Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <i>If "Yes" to 6b, file Form 8870</i>	6b		No
7a 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 If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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
DOREEN BILEZIKIAN 231 WILLOW STREET YARMOUTHPORT, MA 02675	PRESIDENT/DIRECTOR 1 00	0	0	0
HENRY L MURPHY 231 WILLOW STREET YARMOUTHPORT, MA 02675	CLERK/DIRECTOR 1 00	0	0	0
JEFFREY D BILEZIKIAN 231 WILLOW STREET YARMOUTHPORT, MA 02675	TREASURER/DIRECTOR 20 00	95,000	0	0
GREGORY C BILEZIKIAN 231 WILLOW STREET YARMOUTHPORT, MA 02675	VP/DIRECTOR 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
LAKE STREET ADVISORS	INVESTMENT MANAGEMENT	109,690
25 CHESTNUT STREET		
PORTSMOUTH, NH 03801		
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	19,227,536
b	Average of monthly cash balances.	1b	767,707
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	19,995,243
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	19,995,243
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	299,929
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	19,695,314
6	Minimum investment return. Enter 5% of line 5.	6	984,766

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	984,766
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	7,014
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	7,014
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	977,752
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	977,752
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	977,752

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	891,008
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	891,008
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	891,008

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				977,752
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only.			0	
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.				38,102
e From 2015.				
f Total of lines 3a through e.	38,102			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ 891,008				
a Applied to 2015, but not more than line 2a			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.				891,008
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))	38,102			38,102
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				48,642
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)

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

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

1 Information Regarding Foundation Managers:

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

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

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

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

a The name, address, and telephone number or 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	736,841
b <i>Approved for future payment</i>				
Total			3b	0

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	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments.					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities.			14	460,384	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	-67,930	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a _____					
b _____					
c _____					
d _____					
e _____					
12 Subtotal Add columns (b), (d), and (e).		0		392,454	0
13 Total. Add line 12, columns (b), (d), and (e).			13		392,454

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

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 PETER ANDERSON	Preparer's Signature	Date	Check if self-employed <input type="checkbox"/>	PTIN P00463471
Firm's name ► GREENE RUBIN MILLER AND PACINO CPAS				Firm's EIN ► 04-2433152
Firm's address ► 1340 SOLDIERS FIELD ROAD BOSTON, MA 02135				Phone no (617) 254-4422

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)
VANGUARD LONG TERM BOND INDEX FD	P		2016-01-28
EATON VANCE GLOBAL MACRO ABS RET	P		2016-03-23
EATON VANCE GLOBAL MACRO ABS RET	P		2016-03-23
PINE GROVE ALTERNATIVE INVESTMENTS	P		2016-03-31
VANGUARD GLBL REAL EST ETF	P	2014-04-14	2016-08-23
VANGUARD GLBL REAL EST ETF	P	2014-07-01	2016-08-23
VANGUARD GLBL REAL EST ETF	P	2014-08-29	2016-08-23
VANGUARD GLBL REAL EST ETF	P	2014-08-29	2016-08-23
VANGUARD GLBL REAL EST ETF	P	2014-08-29	2016-08-23
VANGUARD GLBL REAL EST ETF	P	2014-08-29	2016-08-23
VANGUARD GLBL REAL EST ETF	P	2014-08-29	2016-08-23

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)
1,254,192		1,255,118	-926
63,391		64,304	-913
1,127,042		1,205,866	-78,824
1,061,437		1,172,119	-110,682
51,373		49,402	1,971
3,926		4,004	-78
3,029		3,116	-87
3,029		3,116	-87
5,087		5,233	-146
5,715		5,880	-165

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-926
			-913
			-78,824
			-110,682
			1,971
			-78
			-87
			-87
			-146
			-165

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)
VANGUARD GLBL REAL EST ETF	P	2014-08-29	2016-08-23
VANGUARD GLBL REAL EST ETF	P	2014-08-29	2016-08-23
VANGUARD GLBL REAL EST ETF	P	2014-08-29	2016-08-23
VANGUARD GLBL REAL EST ETF	P	2014-08-29	2016-08-23
VANGUARD GLBL REAL EST ETF	P	2014-08-29	2016-08-23
VANGUARD GLBL REAL EST ETF	P	2014-08-29	2016-08-23
VANGUARD GLBL REAL EST ETF	P	2014-08-29	2016-08-23
VANGUARD GLBL REAL EST ETF	P	2014-08-29	2016-08-23
VANGUARD GLBL REAL EST ETF	P	2014-08-29	2016-08-23
VANGUARD GLBL REAL EST ETF	P	2015-04-01	2016-08-23
VANGUARD REIT ETF	P	2015-09-11	2016-08-23

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)
5,715		5,883	-168
5,715		5,883	-168
5,715		5,883	-168
5,715		5,883	-168
6,001		6,177	-176
22,861		23,513	-652
28,576		29,401	-825
97,158		100,014	-2,856
310		307	3
3,460		3,526	-66

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-168
			-168
			-168
			-168
			-176
			-652
			-825
			-2,856
			3
			-66

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)
VANGUARD REIT ETF	P	2015-09-11	2016-08-23
VANGUARD REIT ETF	P	2015-09-11	2016-08-23
VANGUARD REIT ETF	P	2015-09-11	2016-08-23
VANGUARD REIT ETF	P	2015-09-11	2016-08-23
VANGUARD REIT ETF	P	2015-09-11	2016-08-23
VANGUARD REIT ETF	P	2015-09-11	2016-08-23
VANGUARD REIT ETF	P	2015-09-11	2016-08-23
VANGUARD REIT ETF	P	2015-09-11	2016-08-23
VANGUARD REIT ETF	P	2015-09-11	2016-08-23
VANGUARD REIT ETF	P	2015-09-11	2016-08-23
VANGUARD REIT ETF	P	2015-09-11	2016-08-23

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)
7,403		7,544	-141
7,760		7,907	-147
8,919		9,089	-170
8,919		9,089	-170
8,919		9,089	-170
8,919		9,089	-170
8,918		9,089	-171
17,838		18,178	-340
17,838		18,178	-340
17,838		18,178	-340

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	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
			-141
			-147
			-170
			-170
			-170
			-170
			-171
			-340
			-340
			-340

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)
VANGUARD REIT ETF	P	2015-09-11	2016-08-23
VANGUARD REIT ETF	P	2015-09-11	2016-08-23
VANGUARD REIT ETF	P	2015-09-11	2016-08-23
VANGUARD REIT ETF	P	2015-09-11	2016-08-23
VANGUARD REIT ETF	P	2015-09-11	2016-08-23
VANGUARD REIT ETF	P	2015-09-11	2016-08-23
VANGUARD REIT ETF	P	2015-09-30	2016-08-23
VANGUARD REIT ETF	P	2015-12-31	2016-08-23
VANGUARD REIT ETF	P	2016-03-29	2016-08-23
VANGUARD REIT ETF	P	2016-03-29	2016-08-23

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)
23,297		23,741	-444
28,832		29,382	-550
44,596		45,445	-849
62,431		63,623	-1,192
62,431		63,623	-1,192
82,945		84,528	-1,583
23,649		24,100	-451
32,919		33,547	-628
8,919		9,089	-170
18,242		18,590	-348

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	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
			-444
			-550
			-849
			-1,192
			-1,192
			-1,583
			-451
			-628
			-170
			-348

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)
VANGUARD REIT ETF	P	2016-06-28	2016-08-23
VANGUARD REIT ETF	P	2016-06-28	2016-08-23
VANGUARD REIT ETF	P	2014-04-14	2016-08-23
VANGUARD REIT ETF	P	2014-04-14	2016-08-23
VANGUARD REIT ETF	P	2014-07-01	2016-08-23
VANGUARD REIT ETF	P	2014-08-29	2016-08-23
VANGUARD REIT ETF	P	2014-08-29	2016-08-23
VANGUARD REIT ETF	P	2014-08-29	2016-08-23
VANGUARD REIT ETF	P	2014-08-29	2016-08-23
VANGUARD REIT ETF	P	2014-08-29	2016-08-23
VANGUARD REIT ETF	P	2014-08-29	2016-08-23

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
3,919		3,994	-75
17,838		18,178	-340
17,839		13,835	4,004
26,211		20,329	5,882
7,300		6,013	1,287
8,919		7,558	1,361
8,919		7,558	1,361
15,912		13,484	2,428
17,482		14,814	2,668
17,839		15,116	2,723

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	
			-75
			-340
			4,004
			5,882
			1,287
			1,361
			1,361
			2,428
			2,668
			2,723

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)
VANGUARD REIT ETF	P	2014-08-29	2016-08-23
VANGUARD REIT ETF	P	2014-10-01	2016-08-23
VANGUARD REIT ETF	P	2014-12-30	2016-08-23
VANGUARD REIT ETF	P	2015-04-01	2016-08-23
VANGUARD REIT ETF	P	2015-07-06	2016-08-23
ISHARES CORE S&P SMALL CAP ETF	P	2015-05-19	2016-12-16
ISHARES CORE S&P SMALL CAP ETF	P	2015-05-19	2016-12-16
ISHARES CORE S&P SMALL CAP ETF	P	2015-05-19	2016-12-16
ISHARES CORE S&P SMALL CAP ETF	P	2015-05-19	2016-12-16
ISHARES CORE S&P SMALL CAP ETF	P	2015-05-19	2016-12-16

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
162,474		137,674	24,800
9,516		7,548	1,968
13,855		12,666	1,189
6,400		5,971	429
10,567		8,959	1,608
1,677		1,414	263
1,677		1,414	263
7,990		6,739	1,251
12,340		10,408	1,932
14,018		11,822	2,196

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	
			24,800
			1,968
			1,189
			429
			1,608
			263
			263
			1,251
			1,932
			2,196

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

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)
ISHARES CORE S&P SMALL CAP ETF	P	2015-05-19	2016-12-16
ISHARES CORE S&P SMALL CAP ETF	P	2015-05-19	2016-12-16
ISHARES CORE S&P SMALL CAP ETF	P	2015-05-19	2016-12-16
ISHARES CORE S&P SMALL CAP ETF	P	2015-07-01	2016-12-16
VANGUARD 500 INDEX FD ADMIRAL SHRS	P		2016-12-16
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)
14,017		11,822	2,195
14,017		11,822	2,195
98,121		82,754	15,367
1,967		1,668	299
289,975		265,299	24,676
34,887			34,887

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			2,195
			2,195
			15,367
			299
			24,676
			34,887

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>				
AMERICAN NATIONAL RED CROSS OF CAPE COD AND ISLANDS 286 SOUTH STREET HYANNIS, MA 02601	NONE	PUBLIC CHARITY	SUPPORT FOR CAPE COD CHAPTER OF THE RED CROSS	2,500
ARMENIAN MEMORIAL CHURCH 32 BIGELOW AVENUE WATERTOWN, MA 02472	NONE	PUBLIC CHARITY	SUPPORT OF CHURCH CULTURAL AND RELIGIOUS ACTIVITIES	5,000
ARMENIAN MISSIONARY ASSOCIATION OF AMERICA 31 W CENTURY ROAD PARAMUS, NJ 07652	NONE	PUBLIC CHARITY	SUPPORT FOR KINDERGARTEN	20,000
ARTS FOUNDATION OF CAPE COD 396 MAIN STREET HYANNIS, MA 02601	NONE	PUBLIC CHARITY	SUPPORT FOR THE ARTS ON CAPE COD	5,500
BIG BROTHER BIG SISTER OF CAPE COD 1934 FALMOUTH ROAD CENTERVILLE, MA 02632	NONE	PUBLIC CHARITY	SUPPORT PROGRAMS OF BIG BROTHER BIG SISTER	10,000
BOSTON MEDICAL CENTER 840 HARRISON AVENUE BOSTON, MA 02118	NONE	PUBLIC CHARITY	SUPPORT FOR SERVICES OF MEDICAL CENTER	10,000
BOY SCOUTS OF CAPE COD AND ISLANDS 247 WILLOW STREET YARMOUTH, MA 02675	NONE	PUBLIC CHARITY	SUPPORT BOY SCOUTS OF CAPE COD AND ISLANDS COUNCIL	7,500
BREWSTER ACADEMY 80 ACADEMY DRIVE WOLFEBORO, NH 03894	NONE	PUBLIC CHARITY	SUPPORT FOR ACADEMY'S LEARNING PROGRAMS	10,000
CAPE COD COMMERCIAL HOOK FISHERMAN ASSOC 1566 MAIN STREET CHATHAM, MA 02633	NONE	PUBLIC CHARITY	SUPPORT FOR THE OUTREACH PROJECT	7,500
CAPE COD CONSERVATORY 2235 IYANNOUGH ROAD WEST BARNSTABLE, MA 02668	NONE	PUBLIC CHARITY	SUPPORT FOR ARTS EDUCATION ON CAPE COD	25,000
CAPE COD COUNSEL OF CHURCHES 320 MAIN STREET HYANNIS, MA 02601	NONE	PUBLIC CHARITY	SUPPORT FOR KITCHEN RENOVATIONS	30,000
CAPE COD FOUNDATION 259 WILLOW STREET 5 YARMOUTHPORT, MA 02675	NONE	PUBLIC CHARITY	SUPPORT FOR ORGANIZATIONS ACTIVITIES	2,500
CAPE COD LEADERSHIP INSTITUTE PO BOX 814 HYANNIS, MA 02601	NONE	PUBLIC CHARITY	SUPPORT FOR THE GROWTH OF COMMUNITY LEADERS	20,000
CAPE COD TIMES NEEDY FUND PO BOX 36 HYANNIS, MA 02601	NONE	PUBLIC CHARITY	SUPPORT FOR THE ORGANIZATION'S EFFORTS TO PROVIDE RESOURCES FOR NEEDY CAPE COD RESIDNETS	2,500
CAPE COD YOUNG PROFESSIONALS PO BOX 634 BARNSTABLE, MA 02630	NONE	PUBLIC CHARITY	SUPPORT FOR ORGANIZATIONS EFFORTS TO ENGAGE EMERGING LEADERS IN THE COMMUNITY	10,000
Total ► 3a				736,841

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 Paid during the year				
CHARLES RIVER CONSERVANCY 4 BRATTLE STREET 309 CAMBRIDGE, MA 02138	NONE	PUBLIC CHARITY	PRESERVATION OF THE CHARLES RIVER AND ITS PARKLANDS	10,000
CHARLES RIVER WATERSHED ASSOCIATION 190 PARK ROAD WESTON, MA 02493	NONE	PUBLIC CHARITY	SUPPORT FOR THE PRESERVATION OF THE CHARLES RIVER AND ITS WATERSHED	20,000
CHILDREN'S HOSPITAL BOSTON 300 LONGWOOD AVENUE BOSTON, MA 02115	NONE	PUBLIC CHARITY	SUPPORT FOR ACTIVITIES AT CHILDREN'S HOSPITAL	5,000
COMPACT OF CAPE COD CONSERVATION TRUST PO BOX 443 BARNSTABLE, MA 02630	NONE	PUBLIC CHARITY	SUPPORT FOR ORGANIZATIONS ASSISTANCE TO LAND TRUSTS TO ACQUIRE AND PRESERVE OPEN SPACE ON CAPE COD	5,000
COTUIT CENTER FOR THE ARTS 4404 FALMOUTH ROAD COTUIT, MA 02635	NONE	PUBLIC CHARITY	SUPPORT MISSION TO BRING TOGETHER ARTISTS AND AUDIENCES IN A NURTURING EXPERIENCE	10,879
CROSSROADS FOR KIDS 119 MYRTLE STREET DUXBURY, MA 02332	NONE	PUBLIC CHARITY	SUPPORT FOR ORGANIZATIONS EFFORTS TO UNLOCK THE POTENTIAL OF YOUTH	10,000
CULTURAL CENTER OF CAPE COD 307 OLD MAIN STREET SOUTH YARMOUTH, MA 02664	NONE	PUBLIC CHARITY	SUPPORT FOR DEVELOPMENT OF VISUAL, LITERARY AND PERFORMING ARTS ON CAPE COD	10,000
CYSTIC FIBROSIS FOUNDATION 220 NORTH MAIN STREET NATICK, MA 01760	NONE	PUBLIC CHARITY	SUPPORT FOR RESEARCH BY THE CYSTIC FIBROSIS FOUNDATION	5,000
FALMOUTH SERVICE CENTER 611 GIFFORD STREET FALMOUTH, MA 02540	NONE	PUBLIC CHARITY	SUPPORT FOR ORGANIZATIONS EFFORTS TO EASE STRESS, REDUCE HUNGER AND IMPROVE QUALITY OF LIFE FOR THE NEEDY	10,000
FALMOUTH VOLUNTEERS IN PUBLIC SCHOOLS 874 GIFFORD STREET FALMOUTH, MA 02540	NONE	PUBLIC CHARITY	SUPPORT FOR VOLUNTEERS TO CONNECT STUDENTS AND FACULTY TO THE COMMUNITY	5,000
FRIENDS OF PROJECT LITERACY 123 MAIN STREET WATERTOWN, MA 02472	NONE	PUBLIC CHARITY	SUPPORT FOR LITERACY PROGRAMS	7,621
FRIENDSHIP HOME OF NORWELL 458 MAIN STREET NORWELL, MA 02061	NONE	PUBLIC CHARITY	SUPPORT HOME'S PROGRAMS TO ENRICH THE LIVES OF THOSE WITH DEVELOPMENTAL DISABILITIES	5,000
GREATER BOSTON FOOD BANK 70 SOUTH BAY AVE BOSTON, MA 02118	NONE	PUBLIC CHARITY	SUPPORT EFFORTS TO PROVIDE FOOD FOR THOSE IN NEED	10,000
HABITAT FOR HUMANITY CAPE COD 411 MAIN STREET YARMOUTHPORT, MA 02675	NONE	PUBLIC CHARITY	SUPPORT FOR ORGANIZATIONS EFFORTS TO PROVIDE HOUSING FOR THOSE IN NEED	50,000
HELPING OUR WOMEN INC 34 CONWELL STREET PROVINCETOWN, MA 02657	NONE	PUBLIC CHARITY	SUPPORT FOR ORGANIZATION HELPING WOMEN OF LOWER AND OUTER CAPE COD	7,500
Total ►				736,841
3a				

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 Paid during the year				
JEWISH FAMILY AND CHILDREN'S SERVICES 174 PORTLAND STREET BOSTON, MA 02114	NONE	PUBLIC CHARITY	SUPPORT FOR HUMAN SERVICE AND HEALTH CARE PROGRAMS	10,000
KATELYNN'S CLOSET INC 45 COMMERCIAL STREET SOUTH YARMOUTH, MA 02664	NONE	PUBLIC CHARITY	SUPPORT FOR PROVIDING CLOTHING TO NEEDY CHILDREN	20,000
LANDMARK SCHOOL 429 HALE STREET PRIDES CROSSING, MA 01965	NONE	PUBLIC CHARITY	SUPPORT FOR PROGRAMS AIDING CHILDREN WITH LEARNING DISABILITIES	19,850
LOWER CAPE OUTREACH COUNCIL 19 BREWSTER CROSS ROAD ORLEANS, MA 02653	NONE	PUBLIC CHARITY	SUPPORT EFFORTS TO PROVIDE SHORT-TERM EMERGENCY ASSISTANCE TO FAMILIES AND INDIVIDUALS	2,500
MASS YOUTH COMMITTED TO WINNING PO BOX 260417 BOSTON, MA 02126	NONE	PUBLIC CHARITY	SUPPORT ORGANIZATIONS EFFORTS IN ITS EDUCATION BASED ATHLETIC PROGRAM	20,000
MASSACHUSETTS MARITIME ACADEMY 101 ACADEMY DRIVE BUZZARDS BAY, MA 02532	NONE	PUBLIC CHARITY	SUPPORT FOR THE ACADEMY'S SUMMER LEARNING PROGRAM	10,000
MIDDLESEX COMMUNITY COLLEGE 591 SPRINGS ROAD BEDFORD, MA 01730	NONE	PUBLIC CHARITY	SUPPORT FOR THE SCHOOL'S EDUCATIONAL ACTIVITIES	21,520
MOVING IN THE SPIRIT 750 GLENWOOD AVE SE ATLANTA, GA 30316	NONE	PUBLIC CHARITY	SUPPORT FOR YOUTH DANCE PROGRAMS	10,000
NATIONAL MARINE LIFE CENTER 120 MAIN STREET BOURNE, MA 02532	NONE	PUBLIC CHARITY	SUPPORT ORGANIZATION'S EFFORTS TO ATTAIN BLOOD TESTING EQUIPMENT	13,219
NAVITY PREPARATORY SCHOOL NEW BEDFORD INC 66 SPRING STREET NEW BEDFORD, MA 02740	NONE	PUBLIC CHARITY	SUPPORT EDUCATIONAL PROGRAMS FOR LOW-INCOME MIDDLESCHOOL BOYS IN THE NEW BEDFORD AREA	5,000
PERKINS SCHOOL FOR THE BLIND 175 NORTH BEACON STREET WATERTOWN, MA 02472	NONE	PUBLIC CHARITY	SUPPORT EDUCATIONAL PROGRAMS FOR INDIVIDUALS WITH VISUAL IMPAIRMENTS	74,752
PUPPET SHOWPLACE THEATRE 32 STATION STREET BROOKLINE, MA 02445	NONE	PUBLIC CHARITY	SUPPORT ORGANIZATION TO EXPOSE DIVERSE AUDIENCES TO PROFESSIONAL PUPPETRY	5,000
SHEA'S YOUTH BASKETBALL 10 BLUE ROCK ROAD SOUTH YARMOUTH, MA 02664	NONE	PUBLIC CHARITY	SUPPORT FOR ORGANIZATION'S DEVELOPMENT OF YOUTH BASKETBALL	5,000
SOUTH SHORE YMCA 79 CODDINGTON STREET QUINCY, MA 02169	NONE	PUBLIC CHARITY	SUPPORT FOR PROGRAMS DEDICATED TO IMPROVING THE QUALITY OF LIFE FOR ALL THROUGH HEALTHY SPIRIT, MIND AND BODY	100,000
UNITED WAY OF CAPE COD & ISLANDS 749 MAIN STREET HYANNIS, MA 02601	NONE	PUBLIC CHARITY	SUPPORT LOCAL CHAPTER OF THE UNITED WAY	10,000
Total ► 3a				736,841

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>				
UNITED WAY OF GREATER NEW BEDFORD INC 105 WILLIAM STREET NEW BEDFORD, MA 02740	NONE	PUBLIC CHARITY	SUPPORT LOCAL CHAPTER OF THE UNITED WAY	35,000
WATERTOWN COMMUNITY FOUNDATION PO BOX 334 WATERTOWN, MA 02471	NONE	PUBLIC CHARITY	SUPPORT WORK TO BUILD AND SUSTAIN A VIBRANT CLOSE KNIT COMMUNITY	15,000
WATERTOWN FAMILY NETWORK 30 COMMON STREET WATERTOWN, MA 02471	NONE	PUBLIC CHARITY	PROMOTE EFFORTS FOR SUPPORTING YOUNG FAMILIES	11,000
WE CAN 783 RTE 28 HARWICHPORT, MA 02646	NONE	PUBLIC CHARITY	SUPPORT ORGANIZATION'S PROGRAMS FOR EMPOWERING WOMEN UNDERGOING CHALLENGING LIFE TRANSITIONS	10,000
Total ▶ 3a				736,841

TY 2016 Investments - Other Schedule**Name:** BILEZIKIAN FAMILY FOUNDATION INC**EIN:** 04-3504021

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
EATON VANCE GLBL MACRO ABSOLUTE RETURN FD	AT COST	0	0
NEUBERGER BERMAN STRAT INCOME	AT COST	1,493,777	1,460,047
VANGUARD TOTAL BOND MKT INDEX	AT COST	4,322,571	4,284,220
ALPS CORE CMDY MGMT COMPLETE	AT COST	1,557,313	1,137,063
VANGUARD 500 INDEX FD ADMIRAL SH	AT COST	3,400,011	4,087,331
WASATCH INTL GROWTH FD	AT COST	955,786	891,032
VANGUARD FTSE EMERGING MARKETS ETF	AT COST	2,737,962	2,707,155
VANGUARD FTSE ETF DEVELOPED MARKETS	AT COST	2,753,880	2,538,557
VANGUARD INTL EQUITY ETF GLOBAL RE FD	AT COST	837,374	772,504
VANGUARD REIT	AT COST	670,798	782,946
PINE GROVE ALTERNATIVE FUNDS	AT COST	0	0
VANGUARD LONG TERM BOND INDEX	AT COST	0	0
ISHARES CORE S&P SMALL CAP ETF	AT COST	831,309	987,660
ISHARES GOLD ETF	AT COST	499,610	428,785
SPDR S&P 500 ETF	AT COST	70,255	71,669

TY 2016 Legal Fees Schedule**Name:** BILEZIKIAN FAMILY FOUNDATION INC**EIN:** 04-3504021

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	1,000	0		1,000

TY 2016 Other Decreases Schedule

Name: BILEZIKIAN FAMILY FOUNDATION INC
EIN: 04-3504021

Description	Amount
MISCELLANEOUS BASIS ADJUSTMENT	16,524

TY 2016 Other Expenses Schedule**Name:** BILEZIKIAN FAMILY FOUNDATION INC**EIN:** 04-3504021**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INSURANCE	5,830	0		5,830
DUES AND MEMBERSHIPS	7,000	0		7,000
MASSACHUSETTS FORM PC ANNUAL FEE	500	0		500
PAYROLL PROCESSING FEES	731	0		731

TY 2016 Other Professional Fees Schedule**Name:** BILEZIKIAN FAMILY FOUNDATION INC**EIN:** 04-3504021

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MANAGEMENT FEES - LAKE STREET ADVISORS	109,690	109,690		0

TY 2016 Taxes Schedule**Name:** BILEZIKIAN FAMILY FOUNDATION INC**EIN:** 04-3504021

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PAYROLL TAXES	7,619	0		7,619

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990 .	OMB No 1545-0047 2016
	Name of the organization BILEZIKIAN FAMILY FOUNDATION INC	Employer identification number 04-3504021

Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	<input type="checkbox"/> 501(c)() (enter number) organization
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	<input type="checkbox"/> 527 political organization
Form 990-PF	<input checked="" type="checkbox"/> 501(c)(3) exempt private foundation
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation
	<input type="checkbox"/> 501(c)(3) taxable private foundation

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

General Rule

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

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

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

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

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

Name of organization BILEZIKIAN FAMILY FOUNDATION INC	Employer identification number 04-3504021
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Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	CHARLES AND DOREEN BILEZIKIAN 83 OYSTER WAY OSTERVILLE, MA 02655	\$ 534,729	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
-		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
-		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
-		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
-		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
-		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
-		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
-		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization BILEZIKIAN FAMILY FOUNDATION INC	Employer identification number 04-3504021
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Part II	Noncash Property
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(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	5,906 SHARES VANGUARD REIT ETF	\$ 534 729	2016-07-13
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

Name of organization BILEZIKIAN FAMILY FOUNDATION INC	Employer identification number 04-3504021
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Part III	Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$ _____ Use duplicate copies of Part III if additional space is needed
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(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
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	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
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(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
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	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
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(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
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	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
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