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

Name of foundation THE EVANS FAMILY FOUNDATION		A Employer identification number 04-3523698	
Number and street (or P.O. box number if mail is not delivered to street address) 31 ST JAMES AVE NO 740		Room/suite	B Telephone number (see instructions) (617) 933-3620
City or town, state or province, country, and ZIP or foreign postal code BOSTON, MA 02116		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 5,728,675	J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis)	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)	6,520,006			
	2 Check ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	2,236	2,236		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-963			
	b Gross sales price for all assets on line 6a 1,130,958				
	7 Capital gain net income (from Part IV, line 2)		411,449		
	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	6,521,279	413,685		
	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)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)	864	864		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	125	125		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	169	169		0
	24 Total operating and administrative expenses. Add lines 13 through 23	1,158	1,158		0
	25 Contributions, gifts, grants paid	1,462,500			1,462,500
	26 Total expenses and disbursements. Add lines 24 and 25	1,463,658	1,158		1,462,500
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	5,057,621			
	b Net investment income (if negative, enter -0-)		412,527		
	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	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	406,855	27,957	27,957
	2 Savings and temporary cash investments	11,176	5,700,624	5,700,718
	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)			
	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)			
	14 Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)	252,929	0	0	
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	670,960	5,728,581	5,728,675	
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	0	0	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0	0	
	29 Retained earnings, accumulated income, endowment, or other funds	670,960	5,728,581	
30 Total net assets or fund balances (see instructions)	670,960	5,728,581		
31 Total liabilities and net assets/fund balances (see instructions) .	670,960	5,728,581		

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	670,960
2 Enter amount from Part I, line 27a	2	5,057,621
3 Other increases not included in line 2 (itemize) ▶ _____	3	0
4 Add lines 1, 2, and 3	4	5,728,581
5 Decreases not included in line 2 (itemize) ▶ _____	5	0
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	5,728,581

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	411,449
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	1,754,593	1,315,792	1 333488
2014	1,627,793	1,973,912	0 824653
2013	1,489,766	3,023,179	0 492781
2012	1,785,772	3,242,389	0 550758
2011	1,244,579	3,290,162	0 378273
2 Total of line 1, column (d)			2 3 579953
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 715991
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5			4 749,675
5 Multiply line 4 by line 3			5 536,761
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 4,125
7 Add lines 5 and 6			7 540,886
8 Enter qualifying distributions from Part XII, line 4			8 1,462,500

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	4,125
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2.	3	4,125
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	4,125
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	16,440
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	16,440
8	Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	12,315
11	Enter the amount of line 10 to be Credited to 2017 estimated tax 12,315 Refunded	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 \$ 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	Yes

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 ► JACQUELINE MCCOY Telephone no ► (617) 933-3620			

Located at **►** 31 ST JAMES AVENUE SUITE 740 BOSTON MA ZIP+4 **►** 02116

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)?		☐	5b	
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? If "Yes," attach the statement required by Regulations section 53.4945–5(d)		☐ Yes ☐ No		
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		☐ Yes ☒ No	6b	No
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870				
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?		☐ Yes ☒ No	7b	
b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?				

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
BRUCE EVANS 31 ST JAMES AVE SUITE 740 BOSTON, MA 02116	TRUSTEE 0 00	0	0	0
BRIDGITT EVANS 31 ST JAMES AVE SUITE 740 BOSTON, MA 02116	TRUSTEE 0 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	(d) Contributions to employee benefit plans and deferred compensation	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	115,804
b	Average of monthly cash balances.	1b	645,287
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	761,091
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	761,091
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	11,416
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	749,675
6	Minimum investment return. Enter 5% of line 5.	6	37,484

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	37,484
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	4,125
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	4,125
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	33,359
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	33,359
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	33,359

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	1,462,500
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	1,462,500
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	4,125
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,458,375

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				33,359
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.	1,082,937			
b From 2012.	1,624,109			
c From 2013.	1,344,075			
d From 2014.	1,533,511			
e From 2015.	1,689,617			
f Total of lines 3a through e.	7,274,249			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ <u>1,462,500</u>				
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.				33,359
e Remaining amount distributed out of corpus	1,429,141			
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	8,703,390			
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				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions). . . .	1,082,937			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	7,620,453			
10 Analysis of line 9				
a Excess from 2012.	1,624,109			
b Excess from 2013.	1,344,075			
c Excess from 2014.	1,533,511			
d Excess from 2015.	1,689,617			
e Excess from 2016.	1,429,141			

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))
BRUCE EVANS

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	1,462,500
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	2,236	
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	-963	
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		1,273	0
13 Total. Add line 12, columns (b), (d), and (e).			13		1,273

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

		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

***** 2017-04-04 *****
 Signature of officer or trustee Date Title
 (see instr. 12) ☒ Yes ☐ No

Print/Type preparer's name JACQUELINE R MCCOY	Preparer's Signature	Date	Check if self-employed ☐	PTIN P00140149
Firm's name ► PAUL MCCOY FAMILY OFFICE SERVICES LLP				Firm's EIN ► 04-3540129
Firm's address ► 31 ST JAMES AVENUE SUITE 740 BOSTON, MA 02116				Phone no (617) 933-3600

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)
ISHARE EDGE MSCI MIN VOLEAFE ETF	P	2016-04-05	2016-06-06
ISHARES CHINA LARGE CAP ETF	P	2015-06-11	2016-02-04
ISHARES COMMODITIES SELCT STR	P	2016-02-24	2016-06-06
ISHARES CURRENCY HEDGED MSCI G	P	2015-02-12	2016-02-04
ISHARES IBOXX INVT GRADEBOND ETF	P	2015-09-03	2016-06-06
ISHARES JPMORGAN USD MTSBOND E	P	2016-06-02	2016-06-07
ISHARES TIPS BOND ETF	P	2016-02-11	2016-06-06
ISHARES 3-7 YEAR TRERY BOND ETF	P	2016-02-04	2016-04-05
ISHARES 7-10 YEAR TRSURYBOND ETF	P	2015-10-01	2016-06-06
SPDR BLMBRG BARCLY SHT TRM CP	P	2015-10-07	2016-06-06

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)
5,393		5,152	241
2,860		4,612	-1,752
1,647		1,351	296
6,425		7,787	-1,362
7,925		7,641	284
7,879		7,780	99
6,678		6,498	180
7,561		7,532	29
6,086		5,934	152
7,018		7,008	10

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	
			241
			-1,752
			296
			-1,362
			284
			99
			180
			29
			152
			10

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 DIVIDEND APPRECIATI	P	2016-02-04	2016-06-06
VANGUARD FTSE DEVELOPED MARKET	P	2016-02-24	2016-06-06
VANGUARD FTSE EMERGING MARKE	P	2016-02-24	2016-06-06
VANGUARD GLBAL EX US REAL ESTA	P	2016-04-05	2016-06-06
VANGUARD INTERMEDIATE TERM CO	P	2015-10-07	2016-06-06
VANGUARD REIT ETF	P	2016-06-02	2016-06-07
WASTE CONNECTIONSINC	D	2016-06-01	2016-06-16
ISHARES GOLD ETF	P	2016-04-29	2016-06-06
A O N PLC F CLASS A	D	2011-12-02	2016-06-16
ACCENTURE PLC FCLASS	D	2012-01-17	2016-06-16

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)
8,004		7,303	701
1,562		1,407	155
5,929		5,216	713
2,918		2,803	115
5,274		5,127	147
7,168		7,122	46
25,401		23,242	2,159
6,648		6,909	-261
5,317		2,452	2,865
1,180		535	645

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	
			701
			155
			713
			115
			147
			46
			2,159
			-261
			2,865
			645

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)
AMERICAN TOWER CORP REIT	D	2011-12-02	2016-06-16
BOSTON SCIENTIFIC CO	D	2014-07-17	2016-06-16
BRISTOL-MYERS SQUIBB	D	2011-08-29	2016-06-16
BROADCOM LTD	D	2015-06-15	2016-06-16
CDK GLOBAL INC	D	2014-07-17	2016-06-16
CHARLES SCHWAB CORP	D	2015-06-15	2016-06-16
CME GROUP INC CLASS	D	2015-06-15	2016-06-16
COMCAST CORPORATION CLASS	D	2012-10-23	2016-06-16
CONSTELLATION BRAND CLASS	D	2014-07-17	2016-06-16
DOW CHEMICAL COMPANY	D	2012-01-03	2016-06-16

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)
10,753		5,897	4,856
6,093		3,342	2,751
16,099		6,600	9,499
122,509		41,152	81,357
1,774		970	804
129,559		57,503	72,056
52,056		30,278	21,778
59,611		34,581	25,030
5,469		3,018	2,451
11,717		6,709	5,008

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	
			4,856
			2,751
			9,499
			81,357
			804
			72,056
			21,778
			25,030
			2,451
			5,008

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)
ECOLAB INC	D	2012-10-23	2016-06-16
EDWARDS LIFESCIENCES	D	2014-07-17	2016-06-16
ELECTRONIC ARTS INC	D	2014-07-17	2016-06-16
EXPRESS SCRIPTS HLDG	D	2011-11-29	2016-06-16
FEDEX CORPORATION	D	2011-12-02	2016-06-16
GLABAL X NEXT EMERGING FRONTIE	P	2014-04-16	2016-02-24
HDFC BANK LIMITD FSPONSORED	D	2015-06-15	2016-06-16
HENRY JACK & ASSOC	D	2012-03-02	2016-06-16
HOME DEPOT INC	D	2015-06-15	2016-06-16
IDEX CORP	D	2015-06-15	2016-06-16

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)
8,929		5,210	3,719
4,365		1,871	2,494
4,772		2,372	2,400
2,990		1,724	1,266
5,657		2,893	2,764
3,107		4,703	-1,596
17,125		8,389	8,736
20,884		8,343	12,541
70,990		42,338	28,652
10,619		5,801	4,818

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	
			3,719
			2,494
			2,400
			1,266
			2,764
			-1,596
			8,736
			12,541
			28,652
			4,818

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)
ISHARES COMMODITIES SELCT STR	P	2015-02-12	2016-06-06
ISHARES JPMORGAN USD MTSBOND E	P	2015-02-12	2016-06-07
ISHARES MSCI HONG KONG ETF	P	2014-08-20	2016-02-04
ISHARES MSCI JAPAN ETXXXREVERS	P	2015-02-12	2016-06-06
ISHARES RUSSELL 2000 ETF	P	2013-06-28	2016-06-06
ISHARES TIPS BOND ETF	P	2012-12-20	2016-06-06
ISHARES 20 PLS YEAR TREASURY BN	P	2015-02-12	2016-02-24
ISHARES 20 PLS YEAR TREASURY B	P	2015-02-12	2016-06-06
ISHARES 7-10 YEAR TRSURYBOND ETF	P	2014-10-09	2016-06-02
ISHARES 7-10 YEAR TRSURYBOND ETF	P	2014-10-09	2016-06-06

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)
4,513		5,649	-1,136
4,164		4,120	44
3,391		4,411	-1,020
7,365		7,288	77
4,933		4,106	827
8,405		8,892	-487
1,180		1,170	10
5,025		4,940	85
7,131		6,826	305
7,192		6,826	366

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	
			-1,136
			44
			-1,020
			77
			827
			-487
			10
			85
			305
			366

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)
MICROSOFT CORP	D	2015-06-15	2016-06-16
MICROSOFT CORP	D	2010-12-08	2016-06-16
NIELSEN HOLDINGS PLC F	D	2015-06-15	2016-06-16
NORTHROP GRUMMAN CO	D	2014-07-17	2016-06-16
NVIDIA CORP	D	2014-07-17	2016-06-16
PIMCO 0-5 YEAR HIGH YLD BND IDX ET	P	2014-06-12	2016-06-06
POWERSHARES QQQ TRUST SRS 1 E	P	2014-07-10	2016-02-11
POWERSHARES QQQ TRUST SRS 1	P	2014-07-10	2016-06-06
POWERSHARES S&P 500 LOW VOLAT	P	2012-12-20	2016-06-06
REYNOLDS AMERICAN	D	2014-08-08	2016-06-16

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)
20,041		10,320	9,721
3,758		2,015	1,743
10,775		5,064	5,711
9,285		5,271	4,014
5,280		2,109	3,171
5,204		5,774	-570
6,836		6,720	116
16,803		14,386	2,417
8,940		6,118	2,822
6,360		3,634	2,726

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	
			9,721
			1,743
			5,711
			4,014
			3,171
			-570
			116
			2,417
			2,822
			2,726

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)
ROSS STORES INC	D	2014-07-17	2016-06-16
SEATTLE GENETICS INC	D	2015-06-15	2016-06-16
SPDR BLMBRG BARCLY SHT TRM CP	P	2015-04-28	2016-04-29
SPDR BLMBRG BARCLY SHT TRM CP	P	2014-06-12	2016-06-06
SPDR S&P 500 ETF	P	2013-06-28	2016-06-06
STARBUCKS CORP	D	2015-06-15	2016-06-16
TOPBUILD CORPORATION	D	2014-07-17	2016-06-16
UNITEDHEALTH GRP INC	D	2014-07-17	2016-06-16
UNITEDHEALTH GRP INC	D	2009-11-12	2016-06-16
VANGUARD DIVIDEND APPRECIATI	P	2014-06-06	2016-06-06

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)
4,682		2,675	2,007
25,965		11,094	14,871
7,412		7,426	-14
6,129		6,159	-30
8,249		6,281	1,968
33,203		19,455	13,748
283		164	119
23,259		14,300	8,959
24,228		5,045	19,183
11,139		10,513	626

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	
			2,007
			14,871
			-14
			-30
			1,968
			13,748
			119
			8,959
			19,183
			626

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 FTSE DEVELOPED MARKET	P	2015-06-05	2016-06-06
VANGUARD FTSE EMERGING MARKE	P	2012-11-05	2016-06-06
VANGUARD GLBAL EX US REAL ESTA	P	2014-07-10	2016-06-06
VANGUARD REIT ETF	P	2014-06-06	2016-06-07
VANGUARD TOTAL BOND MARKET	P	2015-06-05	2016-06-06
VANGUARD TOTAL STOCK MARKET E	P	2013-10-03	2016-06-06
VISA INC CLASS A	D	2015-06-15	2016-06-16
VULCAN MATERIALS COM	D	2014-07-17	2016-06-16
WISDOMTREE JAPAN HEDGED EQUIT	P	2015-03-06	2016-06-02
3M COMPANY	D	2011-12-02	2016-06-16

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)
12,308		12,973	-665
6,835		8,426	-1,591
13,214		14,005	-791
5,987		5,254	733
23,547		23,855	-308
10,726		8,663	2,063
39,060		22,366	16,694
2,970		1,638	1,332
5,864		7,477	-1,613
4,233		2,012	2,221

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	
			-665
			-1,591
			-791
			733
			-308
			2,063
			16,694
			1,332
			-1,613
			2,221

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)
ISHARES GOLD ETF	P	2015-06-05	2016-06-06
PROGRESSIVE CO OHIO	D	2009-11-12	2016-06-16

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)
11,425		11,772	-347
9,708		5,212	4,496

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	
			-347
			4,496

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>				
DIA ART FOUNDATION 535 WEST 22ND STREET NEW YORK, NY 10011	NONE	OTHER PUBLIC CHARITY	ART COUNCIL	5,000
FOUNDATION FOR CONTEMPORARY ARTS 820 GREENWICH STREET NEW YORK, NY 10014	NONE	OTHER PUBLIC CHARITY	GENERAL SUPPORT	2,500
HARVARD BUSINESS SCHOOL 124 MOUNT AUBURN STREET CAMBRIDGE, MA 02138	NONE	OTHER PUBLIC CHARITY	GENERAL SUPPORT	700,000
THE MATCH FOUNDATION INC 1001 COMMONWEALTH AVENUE BOSTON, MA 02215	NONE	OTHER PUBLIC CHARITY	GENERAL SUPPORT	250,000
THE WINSOR SCHOOL 103 PILGRIM ROAD BOSTON, MA 02215	NONE	OTHER PUBLIC CHARITY	GENERAL SUPPORT	5,000
VANDERBILT UNIVERSITY 2301 VANDERBILT PLACE NASHVILLE, TN 37240	NONE	OTHER PUBLIC CHARITY	SUPPORT FOR LIFE SCIENCE, ENGINEERING BLDG AND ENTREPRENEURIAL PROGAM	500,000
Total ► 3a				1,462,500

TY 2016 Other Assets Schedule

Name: THE EVANS FAMILY FOUNDATION

EIN: 04-3523698

Other Assets Schedule

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
ETFS	252,929	0	0

TY 2016 Other Expenses Schedule**Name:** THE EVANS FAMILY FOUNDATION**EIN:** 04-3523698**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OTHER EXPENSES	169	169		0

TY 2016 Other Professional Fees Schedule**Name:** THE EVANS FAMILY FOUNDATION**EIN:** 04-3523698

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CHARLES SCHWAB	864	864		0
NORTHERN TRUST	0	0		0

**TY 2016 Substantial Contributors
Schedule****Name:** THE EVANS FAMILY FOUNDATION**EIN:** 04-3523698**Name****Address**

BRUCE R BRIDGITT B EVANS

31 ST JAMES AVE SUITE 740
BOSTON, MA 02116

TY 2016 Taxes Schedule**Name:** THE EVANS FAMILY FOUNDATION**EIN:** 04-3523698

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MASSACHUSETTS FEES	125	125		0

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 THE EVANS FAMILY FOUNDATION	Employer identification number 04-3523698
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Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 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 THE EVANS FAMILY FOUNDATION	Employer identification number 04-3523698
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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	BRUCE R & BRIDGITT B EVANS	\$ 5,700,000	Person ☒
	31 ST JAMES AVENUE SUITE 740		Payroll ☐
	BOSTON, MA02116		Noncash ☐ (Complete Part II for noncash contributions)
2	BRUCE R & BRIDGITT B EVANS	\$ 820,006	Person ☐
	31 ST JAMES AVENUE SUITE 740		Payroll ☐
	BOSTON, MA02116		Noncash ☒ (Complete Part II for noncash contributions)
-		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)

Name of organization THE EVANS FAMILY FOUNDATION	Employer identification number 04-3523698
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Part II Noncash Property (see Instructions) Use duplicate copies of Part II if additional space is needed			
(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
—	See Additional Data Table	\$	
(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
—		\$	
(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
—		\$	

Name of organization THE EVANS FAMILY FOUNDATION	Employer identification number 04-3523698
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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
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	

Additional Data

Software ID:
Software Version:
EIN: 04-3523698
Name: THE EVANS FAMILY FOUNDATION

Form 990 Schedule B, Part II - Noncash Property (see Instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
<u>2</u>	25 SHARES OF 3M COMPANY	<u>\$ 4,204</u>	<u>2016-06-15</u>
<u>2</u>	50 SHARES OF AON PLC F CLASS A	<u>\$ 5,350</u>	<u>2016-06-15</u>
<u>2</u>	10 SHARES OF ACCENTURE PLC F CLASS A	<u>\$ 1,179</u>	<u>2016-06-15</u>
<u>2</u>	100 SHARES OF AMERICAN TOWER CORP REIT	<u>\$ 10,731</u>	<u>2016-06-15</u>
<u>2</u>	268 SHARES OF BOSTON SCIENTIFIC CO	<u>\$ 6,135</u>	<u>2016-06-15</u>
<u>2</u>	225 SHARES OF BRISTOL-MYERS SQUIBB	<u>\$ 16,453</u>	<u>2016-06-15</u>
<u>2</u>	778 SHARES OF BROADCOM LTD F	<u>\$ 123,820</u>	<u>2016-06-15</u>
<u>2</u>	32 SHARES OF CDK GLOBAL INC	<u>\$ 1,793</u>	<u>2016-06-15</u>
<u>2</u>	4,576 SHARES OF CHARLES SCHWAB CORP	<u>\$ 130,416</u>	<u>2016-06-15</u>
<u>2</u>	550 SHARES OF CME GROUP INC CLASS A	<u>\$ 52,046</u>	<u>2016-06-15</u>

Form 990 Schedule B, Part II - Noncash Property (see Instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
<u>2</u>	950 SHARES OF COMCAST CORPORATION CLASS A	<u>\$ 59,544</u>	<u>2016-06-15</u>
<u>2</u>	35 SHARES OF CONSTELLATION BRAND CLASS A	<u>\$ 5,485</u>	<u>2016-06-15</u>
<u>2</u>	225 SHARES OF DOW CHEMICAL COMPANY	<u>\$ 11,710</u>	<u>2016-06-15</u>
<u>2</u>	75 SHARES OF ECOLAB INC	<u>\$ 8,940</u>	<u>2016-06-15</u>
<u>2</u>	44 SHARES OF EDWARDS LIFESCIENCES	<u>\$ 4,369</u>	<u>2016-06-15</u>
<u>2</u>	64 SHARES OF ELECTRONIC ARTS INC	<u>\$ 4,777</u>	<u>2016-06-15</u>
<u>2</u>	40 SHARES OF EXPRESS SCRIPTS HLDG	<u>\$ 3,007</u>	<u>2016-06-15</u>
<u>2</u>	35 SHARES OF FEDEX CORPORATION	<u>\$ 5,615</u>	<u>2016-06-15</u>
<u>2</u>	261 SHARES OF HDFC BANK LIMITD F ADR 1 ADR REPS 3 ORD SHS	<u>\$ 16,992</u>	<u>2016-06-15</u>
<u>2</u>	250 SHARES OF HENRY JACK & ASSOC	<u>\$ 21,100</u>	<u>2016-06-15</u>

Form 990 Schedule B, Part II - Noncash Property (see Instructions) Use duplicate copies of Part II if additional space is needed			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
<u>2</u>	559 SHARES OF HOME DEPOT INC	<u>\$ 70,780</u>	<u>2016-06-15</u>
<u>2</u>	125 SHARES OF IDEX CORP	<u>\$ 10,704</u>	<u>2016-06-15</u>
<u>2</u>	475 SHARES OF MICROSOFT CORP	<u>\$ 23,705</u>	<u>2016-06-15</u>
<u>2</u>	200 SHARES OF NIELSEN HOLDINGS PLC F	<u>\$ 10,870</u>	<u>2016-06-15</u>
<u>2</u>	43 SHARES OF NORTHROP GRUMMAN CO	<u>\$ 9,344</u>	<u>2016-06-15</u>
<u>2</u>	112 SHARES OF NVIDIA CORP	<u>\$ 5,293</u>	<u>2016-06-15</u>
<u>2</u>	305 SHARES OF PROGRESSIVE CO OHIO	<u>\$ 9,739</u>	<u>2016-06-15</u>
<u>2</u>	126 SHARES OF REYNOLDS AMERICAN	<u>\$ 6,341</u>	<u>2016-06-15</u>
<u>2</u>	86 SHARES OF ROSS STORIES INC	<u>\$ 4,665</u>	<u>2016-06-15</u>
<u>2</u>	670 SHARES OF SEATTLE GENETICS INC	<u>\$ 26,308</u>	<u>2016-06-15</u>

Form 990 Schedule B, Part II - Noncash Property (see Instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
<u>2</u>	600 SHARES OF STARBUCKS CORP	<u>\$ 33,408</u>	<u>2016-06-15</u>
<u>2</u>	8 SHARES OF TOPBUILD CORPORATION	<u>\$ 283</u>	<u>2016-06-15</u>
<u>2</u>	343 SHARES OF UNITEDHEALTH GRP INC	<u>\$ 47,200</u>	<u>2016-06-15</u>
<u>2</u>	500 SHARES OF VISA INC CLASS A	<u>\$ 39,223</u>	<u>2016-06-15</u>
<u>2</u>	26 SHARES OF VULCAN MATERIALS COM	<u>\$ 2,976</u>	<u>2016-06-15</u>
<u>2</u>	350 SHARES OF WASTE CONNECTIONS IN	<u>\$ 25,501</u>	<u>2016-06-15</u>