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Form **990-PF**

Return of Private Foundation

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

OMB No 1545-0052

2016Department of the Treasury
Internal Revenue Service

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

Open to Public Inspection

For calendar year 2016 or tax year beginning , and ending

| | | |
|--|---|---|
| Name of foundation The George F & Sybil H Fuller Foundation | | A Employer identification number 04-6125606 |
| Number and street (or P O box number if mail is not delivered to street address) 370 Main Street, Suite 660 | Room/suite | B Telephone number (see instructions) 508-755-1684 |
| City or town, state or province, country, and ZIP or foreign postal code Worcester MA 01608 | | 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) ► \$ 48,808,656 | J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) | F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/> |
| (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) | | | | |
| | 2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B | | | | |
| | 3 Interest on savings and temporary cash investments | 404 | 404 | 404 | |
| | 4 Dividends and interest from securities | 919,529 | 919,529 | 919,529 | |
| | 5a Gross rents | | | | |
| | b Net rental income or (loss) | | | | |
| | 6a Net gain or (loss) from sale of assets not on line 10 Stmt 1 | 449,276 | | | |
| | b Gross sales price for all assets on line 6a 17,254,139 | | | | |
| | 7 Capital gain net income (from Part IV, line 2) | | | | |
| | 8 Net short-term capital gain | | | | |
| | 9 Income modifications | | | | |
| | 10a Gross sales less returns and allowances | | | | |
| b Less Cost of goods sold | | | | | |
| c Gross profit or (loss) (attach schedule) | | | | | |
| 11 Other income (attach schedule) Stmt 2 | 2,093 | | 2,093 | | |
| 12 Total. Add lines 1 through 11 | 1,371,302 | 919,933 | 922,026 | | |
| Operating and Administrative Expenses | 13 Compensation of officers, directors, trustees, etc | 164,000 | 82,000 | | 82,000 |
| | 14 Other employee salaries and wages | | | | |
| | 15 Pension plans, employee benefits | 26,037 | 13,019 | | 13,018 |
| | 16a Legal fees (attach schedule) See Stmt 3 | 1,620 | 810 | | 810 |
| | b Accounting fees (attach schedule) Stmt 4 | 14,400 | 7,200 | | 7,200 |
| | c Other professional fees (attach schedule) Stmt 5 | 90,078 | 90,078 | | |
| | 17 Interest | | | | |
| | 18 Taxes (attach schedule) (see instructions) Stmt 6 | 16,972 | 8,879 | | 8,093 |
| | 19 Depreciation (attach schedule) and depletion Stmt 7 | 2,353 | | | |
| | 20 Occupancy | 37,513 | | | 37,513 |
| | 21 Travel, conferences, and meetings | | | | |
| | 22 Printing and publications | | | | |
| | 23 Other expenses (att. sch) Stmt 8 | 8,951 | | | 8,951 |
| | 24 Total operating and administrative expenses. Add lines 13 through 23 | 361,924 | 201,986 | 0 | 157,585 |
| | 25 Contributions, gifts, grants paid | 2,951,500 | | | 2,951,500 |
| 26 Total expenses and disbursements. Add lines 24 and 25 | 3,313,424 | 201,986 | 0 | 3,109,085 | |
| 27 Subtract line 26 from line 12: | | | | | |
| a Excess of revenue over expenses and disbursements | -1,942,122 | | | | |
| b Net investment income (if negative, enter -0-) | | 717,947 | | | |
| c Adjusted net income (if negative, enter -0-) | | | 922,026 | | |

For Paperwork Reduction Act Notice, see instructions.

Form 990-PF (2016)

| Part II Balance Sheets | | Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions) | | Beginning of year | End of year | |
|------------------------------------|---|--|----------|-------------------|-------------------|-----------------------|
| | | | | (a) Book Value | (b) Book Value | (c) Fair Market Value |
| Assets | 1 Cash – non-interest-bearing | | | 119,036 | 13,793 | 13,793 |
| | 2 Savings and temporary cash investments | | | 1,264,890 | 349,570 | 349,570 |
| | 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 ▶ | | 0 | | | |
| | 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) See Stmt 9 | | | 4,162,958 | 3,800,274 | 3,800,274 |
| | c Investments – corporate bonds (attach schedule) | | | | | |
| | 11 Investments – land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch) ▶ | | | | | |
| | 12 Investments – mortgage loans | | | | | |
| | 13 Investments – other (attach schedule) See Statement 10 | | | 43,538,953 | 44,641,849 | 44,641,849 |
| | 14 Land, buildings, and equipment basis ▶ 94,981 Less accumulated depreciation (attach sch) ▶ Stmt 11 91,811 | | | 4,027 | 3,170 | 3,170 |
| | 15 Other assets (describe ▶) | | | | | |
| | 16 Total assets (to be completed by all filers – see the instructions Also, see page 1, item I) | | | 49,089,864 | 48,808,656 | 48,808,656 |
| 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. ▶ <input type="checkbox"/> | | | | | |
| | 24 Unrestricted | | | | | |
| | 25 Temporarily restricted | | | | | |
| | 26 Permanently restricted | | | | | |
| | Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/> | | | | | |
| | 27 Capital stock, trust principal, or current funds | | | | | |
| | 28 Paid-in or capital surplus, or land, bldg, and equipment fund | | | | | |
| | 29 Retained earnings, accumulated income, endowment, or other funds | | | 49,089,864 | 48,808,656 | |
| | 30 Total net assets or fund balances (see instructions) | | | 49,089,864 | 48,808,656 | |
| | 31 Total liabilities and net assets/fund balances (see instructions) | | | 49,089,864 | 48,808,656 | |

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 | 49,089,864 |
| 2 Enter amount from Part I, line 27a | 2 | -1,942,122 |
| 3 Other increases not included in line 2 (itemize) ▶ See Statement 12 | 3 | 1,660,914 |
| 4 Add lines 1, 2, and 3 | 4 | 48,808,656 |
| 5 Decreases not included in line 2 (itemize) ▶ | 5 | |
| 6 Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30 | 6 | 48,808,656 |

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 N/A | | | | |
| 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 | | | |
| b | | | |
| c | | | |
| d | | | |
| e | | | |

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

| (i) FMV as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of col. (i) over col. (j), if any | (l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h)) |
|------------------------|--------------------------------------|---|---|
| a | | | |
| b | | | |
| c | | | |
| d | | | |
| e | | | |

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

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

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

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

| (a) Base period years Calendar year (or tax year beginning in) | (b) Adjusted qualifying distributions | (c) Net value of noncharitable-use assets | (d) Distribution ratio (col. (b) divided by col. (c)) |
|--|--|--|---|
| 2015 | 3,502,558 | 51,226,699 | 0.068374 |
| 2014 | 3,755,014 | 54,017,172 | 0.069515 |
| 2013 | 3,614,350 | 53,394,605 | 0.067691 |
| 2012 | 3,034,625 | 46,516,191 | 0.065238 |
| 2011 | 2,935,108 | 45,584,610 | 0.064388 |

| | | |
|---|----------|------------|
| 2 Total of line 1, column (d) | 2 | 0.335206 |
| 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 | 0.067041 |
| 4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5 | 4 | 47,136,824 |
| 5 Multiply line 4 by line 3 | 5 | 3,160,100 |
| 6 Enter 1% of net investment income (1% of Part I, line 27b) | 6 | 7,179 |
| 7 Add lines 5 and 6 | 7 | 3,167,279 |
| 8 Enter qualifying distributions from Part XII, line 4 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. | 8 | 3,109,085 |

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 | 14,359 |
| 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 | 14,359 |
| 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 | 14,359 |
| 6 | Credits/Payments | | |
| a | 2016 estimated tax payments and 2015 overpayment credited to 2016 | 6a | 29,712 |
| 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 | 29,712 |
| 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 | 15,353 |
| 11 | Enter the amount of line 10 to be Credited to 2017 estimated tax 15,353 Refunded | 11 | |

Part VII-A Statements Regarding Activities

| | Yes | No |
|--|----------|----------|
| 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? | | X |
| b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the 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> | | X |
| c Did the foundation file Form 1120-POL for this year? | | X |
| d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation \$ _____ (2) On foundation managers \$ _____ | | |
| e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ _____ | | |
| 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i> | | X |
| 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> | | X |
| 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? | | X |
| b If "Yes," has it filed a tax return on Form 990-T for this year? | | |
| 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> | | X |
| 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? | X | |
| 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> | X | |
| 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> | X | |
| 9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i> | | X |
| 10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i> | | X |

Part VII-A Statements Regarding Activities (continued)

| | Yes | No |
|--|----------|----------|
| 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) | | X |
| 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) | | X |
| 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► gsfullerfoundation.org | X | |
| 14 The books are in care of ► Mark W. Fuller, Treasurer 370 Main Street, Suite 660 Located at ► Worcester MA ZIP+4 ► 01608 Telephone no ► 508-755-1684 | | |
| 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 the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ► | | X |

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.

| | Yes | No |
|---|---|----------|
| 1a During the year did the foundation (either directly or indirectly) | | |
| (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)? Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/> | N/A | 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? | N/A | 1c |
| 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? If "Yes," list the years ► 20 , 20 , 20 , 20 | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | |
| 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.) | N/A | 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.) | N/A | 3b |
| 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? | | X |
| 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? | | X |

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)? Organizations relying on a current notice regarding disaster assistance check here | N/A | | 5b |
| 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) | N/A <input type="checkbox"/> Yes <input type="checkbox"/> No | | |
| 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? If "Yes" to 6b, file Form 8870 | | | 6b |
| 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? | N/A | | 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 | (b) Title, and average hours per week devoted to position | (c) Compensation (If not paid, enter -0-) | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|----------------------|---|---|---|---------------------------------------|
| See Statement 13 | | | | |
| | | | | |
| | | | | |
| | | | | |

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

| (a) Name and address of each employee paid more than \$50,000 | (b) Title, and average hours per week devoted to position | (c) Compensation | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|---|---|------------------|---|---------------------------------------|
| NONE | | | | |
| | | | | |
| | | | | |
| | | | | |

Total number of other employees paid over \$50,000

0

Form 990-PF (2016) **The George F & Sybil H Fuller****04-6125606**Page **7****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 |
|---|------------------------|------------------|
| Morgan Stanley | Invest. Advisor | 90,078 |
| | | |
| | | |
| | | |
| | | |
| 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 Contributions, gifts and grants provided to 87 organizations in 2016. | 2,951,500 |
| 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 N/A | |
| 2 | |
| All other program-related investments See instructions | |
| 3 | |
| Total. Add lines 1 through 3 | |

Form **990-PF** (2016)

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 | 37,590,983 |
| b | Average of monthly cash balances | 1b | 590,541 |
| c | Fair market value of all other assets (see instructions) | 1c | 9,673,120 |
| d | Total (add lines 1a, b, and c) | 1d | 47,854,644 |
| 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 | 47,854,644 |
| 4 | Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions) | 4 | 717,820 |
| 5 | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5 | 47,136,824 |
| 6 | Minimum investment return. Enter 5% of line 5 | 6 | 2,356,841 |

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 | 2,356,841 |
| 2a | Tax on investment income for 2016 from Part VI, line 5 | 2a | 14,359 |
| b | Income tax for 2016 (This does not include the tax from Part VI.) | 2b | |
| c | Add lines 2a and 2b | 2c | 14,359 |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 | 3 | 2,342,482 |
| 4 | Recoveries of amounts treated as qualifying distributions | 4 | |
| 5 | Add lines 3 and 4 | 5 | 2,342,482 |
| 6 | Deduction from distributable amount (see instructions) | 6 | |
| 7 | Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 | 7 | 2,342,482 |

Part XII Qualifying Distributions (see instructions)

| | | | |
|----------|--|-----------|------------------|
| 1 | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes | 1a | 3,109,085 |
| a | Expenses, contributions, gifts, etc. – total from Part I, column (d), line 26 | 1b | |
| b | Program-related investments – total from Part IX-B | | |
| 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 | 3,109,085 |
| 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 | 3,109,085 |

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 | | | | 2,342,482 |
| 2 Undistributed income, if any, as of the end of 2016 | | | | |
| a Enter amount for 2015 only | | | | |
| b Total for prior years: 20____, 20____, 20____ | | | | |
| 3 Excess distributions carryover, if any, to 2016 | | | | |
| a From 2011 | | | | 672,717 |
| b From 2012 | | | | 754,727 |
| c From 2013 | | | | 994,920 |
| d From 2014 | | | | 1,130,647 |
| e From 2015 | | | | 958,599 |
| f Total of lines 3a through e | 4,511,610 | | | |
| 4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ 3,109,085 | | | | |
| a Applied to 2015, but not more than line 2a | | | | |
| b Applied to undistributed income of prior years (Election required – see instructions) | | | | |
| c Treated as distributions out of corpus (Election required – see instructions) | | | | |
| d Applied to 2016 distributable amount | | | | 2,342,482 |
| e Remaining amount distributed out of corpus | 766,603 | | | |
| 5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a)) | | | | |
| 6 Enter the net total of each column as indicated below: | 5,278,213 | | | |
| a Corpus Add lines 3f, 4c, and 4e Subtract line 5 | | | | |
| b Prior years' undistributed income Subtract line 4b from line 2b | | | | |
| c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed | | | | |
| d Subtract line 6c from line 6b Taxable amount – see instructions | | | | |
| e Undistributed income for 2015 Subtract line 4a from line 2a Taxable amount – see instructions | | | | |
| 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) | | | | |
| 8 Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions) | 672,717 | | | |
| 9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a | 4,605,496 | | | |
| 10 Analysis of line 9 | | | | |
| a Excess from 2012 | | | | 754,727 |
| b Excess from 2013 | | | | 994,920 |
| c Excess from 2014 | | | | 1,130,647 |
| d Excess from 2015 | | | | 958,599 |
| e Excess from 2016 | | | | 766,603 |

Form **990-PF** (2016)

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 Paid during the year See Attached Schedule | Operating, Capital, and Scholarships | | | 2,951,500 |
| Total | | | | |
| b Approved for future payment N/A | | | | |
| Total | | | | |

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

- 1** Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?
- a** Transfers from the reporting foundation to a noncharitable exempt organization of
- (1) Cash
- (2) Other assets
- b** Other transactions
- (1) Sales of assets to a noncharitable exempt organization
- (2) Purchases of assets from a noncharitable exempt organization
- (3) Rental of facilities, equipment, or other assets
- (4) Reimbursement arrangements
- (5) Loans or loan guarantees
- (6) Performance of services or membership or fundraising solicitations
- c** Sharing of facilities, equipment, mailing lists, other assets, or paid employees
- d** If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

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

[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 |
|--------------------------|--------------------------|---------------------------------|
| N/A | | |
| | | |
| | | |
| | | |
| | | |

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

**Sign
Here**

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

Signature of officer or trustee

Date _____

Title

Date _____

Check ☐ if self-employed

Paid
Preparer
Use Only

Mark L. Love, CPA

Preparer's signature

5-3-17

Firm's name ► **M Love & Associates, LLC**
Firm's address ► **67 Millbrook Street
Worcester, MA 01606**

PTIN P00516264

Firm's EIN ▶ **46-4181625**

Phone no **508-797-5200**

Federal Statements**Statement 1 - Form 990-PF, Part I, Line 6a - Sale of Assets**

| Description | | How Received | | Whom Sold | | Date Acquired |
|-----------------------|---------------|---------------|----------|--------------|-----------------|---------------|
| Date Sold | Sale Price | Cost | Expense | Depreciation | Net Gain / Loss | |
| Morgan Stanley 025356 | | | Purchase | | | Various |
| Various \$ | 14,985,516 | \$ 14,437,610 | \$ | \$ | 547,906 | |
| Morgan Stanley 025358 | | | Purchase | | | Various |
| Various | 1,075,668 | 1,104,344 | | | -28,676 | |
| Morgan Stanley 025358 | | | Purchase | | | Various |
| Various | 820,154 | 819,064 | | | 1,090 | |
| Morgan Stanley 034669 | | | Purchase | | | Various |
| Various | 309,235 | 366,723 | | | -57,488 | |
| Morgan Stanley 034545 | | | Purchase | | | Various |
| Various | 63,566 | 77,122 | | | -13,556 | |
| Total | \$ 17,254,139 | \$ 16,804,863 | \$ 0 | \$ 0 | \$ 449,276 | |

Statement 2 - Form 990-PF, Part I, Line 11 - Other Income

| Description | | Revenue per Books | Net Investment Income | Adjusted Net Income |
|-------------------------|--|-------------------|-----------------------|---------------------|
| Refunded property taxes | | \$ 2,093 | \$ | \$ 2,093 |
| Total | | \$ 2,093 | \$ 0 | \$ 2,093 |

Statement 3 - Form 990-PF, Part I, Line 16a - Legal Fees

| Description | | Total | Net Investment | Adjusted Net | Charitable Purpose |
|-------------|--|----------|----------------|--------------|--------------------|
| Legal fees | | \$ 1,620 | \$ 810 | \$ | \$ 810 |
| Total | | \$ 1,620 | \$ 810 | \$ 0 | \$ 810 |

Federal Statements**Statement 4 - Form 990-PF, Part I, Line 16b - Accounting Fees**

| Description | Total | Net Investment | Adjusted Net | Charitable Purpose |
|-----------------|-----------|----------------|--------------|--------------------|
| Accounting Fees | \$ 14,400 | \$ 7,200 | \$ | \$ 7,200 |
| Total | \$ 14,400 | \$ 7,200 | \$ 0 | \$ 7,200 |

Statement 5 - Form 990-PF, Part I, Line 16c - Other Professional Fees

| Description | Total | Net Investment | Adjusted Net | Charitable Purpose |
|-----------------|-----------|----------------|--------------|--------------------|
| Investment fees | \$ 90,078 | \$ 90,078 | \$ | \$ |
| Total | \$ 90,078 | \$ 90,078 | \$ 0 | \$ 0 |

Statement 6 - Form 990-PF, Part I, Line 18 - Taxes

| Description | Total | Net Investment | Adjusted Net | Charitable Purpose |
|---------------|-----------|----------------|--------------|--------------------|
| Foreign Taxes | \$ 1,717 | \$ 1,717 | \$ | \$ |
| Other Taxes | 932 | | | 932 |
| Payroll Taxes | 14,323 | 7,162 | | 7,161 |
| Total | \$ 16,972 | \$ 8,879 | \$ 0 | \$ 8,093 |

Statement 7 - Form 990-PF, Part I, Line 19 - Depreciation

| Description | Date Acquired | Cost Basis | | | |
|-------------------------|---------------------------|-----------------------|---------------------|--|--|
| Prior Year Depreciation | Current Year Depreciation | Net Investment Income | Adjusted Net Income | | |
| Furniture & Fixtures | | \$ 67,802 | | | |
| \$ 76,995 Straight Line | Var | \$ 2,353 | \$ | | |
| Leasehold Improvements | | 12,824 | | | |
| 12,461 Straight Line | Var | | | | |
| Total | | \$ 80,626 | | | |
| \$ 89,456 | \$ 2,353 | \$ 0 | \$ 0 | | |

Federal Statements**Statement 8 - Form 990-PF, Part I, Line 23 - Other Expenses**

| <u>Description</u> | <u>Total</u> | <u>Net Investment</u> | <u>Adjusted Net</u> | <u>Charitable Purpose</u> |
|-------------------------------|--------------|-----------------------|---------------------|---------------------------|
| | \$ | \$ | \$ | \$ |
| Expenses | | | | |
| Bank Service charges | 70 | | | 70 |
| HR fee | 265 | | | 265 |
| Insurance | 6,015 | | | 6,015 |
| Meals and Entertainment | 897 | | | 897 |
| Memberships and dues | 575 | | | 575 |
| Postage and Delivery | 49 | | | 49 |
| Supplies and other office exp | 1,080 | | | 1,080 |
| Total | \$ 8,951 | \$ 0 | \$ 0 | \$ 8,951 |

Statement 9 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

| <u>Description</u> | <u>Beginning of Year</u> | <u>End of Year</u> | <u>Basis of Valuation</u> | <u>Fair Market Value</u> |
|---------------------------------|--------------------------|--------------------|---------------------------|--------------------------|
| Corporate Stock- Morgan Stanley | \$ 4,162,958 | \$ 3,800,274 | Market | \$ 3,800,274 |
| Total | \$ 4,162,958 | \$ 3,800,274 | | \$ 3,800,274 |

Federal Statements**Statement 10 - Form 990-PF, Part II, Line 13 - Other Investments**

| <u>Description</u> | <u>Beginning of Year</u> | <u>End of Year</u> | <u>Basis of Valuation</u> | <u>Fair Market Value</u> |
|--------------------------------------|------------------------------|------------------------|-------------------------------|------------------------------|
| Private Investments - UBS | \$ 5,143 | \$ | Market | \$ |
| Private Investments - Concentric | 1,069,934 | 1,069,934 | Cost | 1,069,934 |
| Special Investment Funds - MSSB | 2,835,448 | 6,634,548 | Market | 6,634,548 |
| Private Investments - Biomedical | 643,530 | 643,530 | Cost | 643,530 |
| Private Investments - Wellesley/Frnt | 1,000,000 | 1,000,000 | Cost | 1,000,000 |
| Mutual Funds - MSSB | 37,984,898 | 35,293,837 | Market | 35,293,837 |
| Total | \$ 43,538,953 | \$ 44,641,849 | | \$ 44,641,849 |

Statement 11 - Form 990-PF, Part II, Line 14 - Land, Building, and Equipment

| <u>Description</u> | <u>Beginning Net Book</u> | <u>End Cost / Basis</u> | <u>End Accumulated Depreciation</u> | <u>Net FMV</u> |
|-------------------------|-------------------------------|-----------------------------|---|--------------------|
| Furniture and Equipment | \$ 4,027 | \$ 82,157 | \$ 78,987 | \$ 3,170 |
| Leasehold Improvements | | 12,824 | 12,824 | |
| Total | \$ 4,027 | \$ 94,981 | \$ 91,811 | \$ 3,170 |

Statement 12 - Form 990-PF, Part III, Line 3 - Other Increases

| <u>Description</u> | <u>Amount</u> |
|---|---------------|
| Net unrealized gains (losses) on securities | \$ 1,660,914 |
| Total | \$ 1,660,914 |

**Statement 13 - Form 990-PF, Part VIII, Line 1 - List of Officers, Directors, Trustees,
Etc.**

| <u>Name and Address</u> | <u>Title</u> | <u>Average Hours</u> | <u>Compensation</u> | <u>Benefits</u> | <u>Expenses</u> |
|-------------------------------------|--------------|--------------------------|---------------------|-----------------|-----------------|
| Mark W. Fuller 57 Central Street | Chairman/Tre | 30.00 | 27,000 | 0 | 0 |

Federal Statements**Statement 13 - Form 990-PF, Part VIII, Line 1 - List of Officers, Directors, Trustees,
Etc. (continued)**

| <u>Name and Address</u> | <u>Title</u> | <u>Average Hours</u> | <u>Compensation</u> | <u>Benefits</u> | <u>Expenses</u> |
|-----------------------------|--------------|--------------------------|---------------------|-----------------|-----------------|
| Boylston MA 01505 | | | | | |
| Joyce I. Fuller | Trustee | 16.00 | 22,000 | 0 | 0 |
| 93 Briarwood Circle | | | | | |
| Worcester MA 01606 | | | | | |
| Janice L. Fuller | V Chair/Asst | 30.00 | 27,000 | 0 | 0 |
| 57 Central Street | | | | | |
| Boylston MA 01505 | | | | | |
| David P. Hallock | Trustee | 16.00 | 22,000 | 0 | 0 |
| 35-49 Commons Drive | | | | | |
| Shrewsbury MA 01545 | | | | | |
| Lincoln E. Fuller | Trustee | 16.00 | 22,000 | 0 | 0 |
| Rte 11, P.O. Box 2639 | | | | | |
| New London NH 03257 | | | | | |
| Diane H. Robbins | Secretary | 16.00 | 22,000 | 0 | 0 |
| 111 Clark Street | | | | | |
| Newton MA 02459 | | | | | |
| Kelsa L. Zereski | Trustee | 16.00 | 22,000 | 0 | 0 |
| 88 Spring Street | | | | | |

Federal Statements**Statement 13 - Form 990-PF, Part VIII, Line 1 - List of Officers, Directors, Trustees,
Etc. (continued)**

| Name and Address | | Title | Average Hours | Compensation | Benefits | Expenses |
|---------------------|--|-------|------------------|--------------|----------|----------|
| Shrewsbury MA 01545 | | | | | | |

Statement 14 - Form 990-PF, Part XV, Line 2b - Application Format and Required Contents**Description**

A formal proposal detailing the amount requested and the use to which those funds will be put, accompanied by financial statements.

The George F. and Sybil H. Fuller Foundation
EIN 04-6125606
2016 Contributions

| Date | Name | Memo | Class | Debit |
|--------------------------------------|-------------------------------|------------------|-------------------------------|-----------|
| 15-40 Connection | | | | |
| 03/03/2016 | 15-40 Connection | grant | Health Services & Related | 16,000 00 |
| Total 15-40 Connection | | | | 16,000 00 |
| Abby's House | | | | |
| 12/02/2016 | Abby's House | grant | Social & Rehab Services | 2,500 00 |
| Total Abby's House | | | | 2,500 00 |
| Alice Lloyd College | | | | |
| 03/03/2016 | Alice Lloyd College | scholarship | Education - Colleges & Univer | 5,000 00 |
| Total Alice Lloyd College | | | | 5,000 00 |
| American Antiquarian Society | | | | |
| 01/26/2016 | American Antiquarian Society | grant commitment | Arts, Sciences, Museums, Hist | 50,000 00 |
| Total American Antiquarian Society | | | | 50,000 00 |
| American Diabetes Association | | | | |
| 03/08/2016 | American Diabetes Association | grant | Health Services & Related | 5,000 00 |
| Total American Diabetes Association | | | | 5,000 00 |
| American Red Cross | | | | |
| 06/15/2016 | American Red Cross | grant | Health Services & Related | 15,000 00 |
| 12/02/2016 | American Red Cross | grant | Health Services & Related | 2,500 00 |
| Total American Red Cross | | | | 17,500 00 |
| Anna Maria College | | | | |
| 06/15/2016 | Anna Maria College | scholarship | Education - Colleges & Univer | 10,000 00 |
| Total Anna Maria College | | | | 10,000 00 |
| ARTSWorcester | | | | |
| 03/03/2016 | ARTSWorcester | grant | Arts, Sciences, Museums, Hist | 5,000 00 |
| Total ARTSWorcester | | | | 5,000 00 |
| Assumption College | | | | |
| 06/15/2016 | Assumption College | scholarship | Education - Colleges & Univer | 10,000 00 |
| Total Assumption College | | | | 10,000 00 |
| Bancroft School | | | | |
| 03/03/2016 | Bancroft School | grant | Education - Other | 10,000 00 |
| 12/20/2016 | Bancroft School | grant commitment | Education - Other | 75,000 00 |
| Total Bancroft School | | | | 85,000 00 |
| Bay Path College | | | | |
| 06/15/2016 | Bay Path College | scholarship | Education - Colleges & Univer | 10,000 00 |
| Total Bay Path College | | | | 10,000 00 |
| Be Like Brit Foundation, Inc. | | | | |
| 03/03/2016 | Be Like Brit Foundation, Inc | grant | Social & Rehab Services | 5,000 00 |
| 06/02/2016 | Be Like Brit Foundation, Inc | grant | Social & Rehab Services | 19,000 00 |
| 12/02/2016 | Be Like Brit Foundation, Inc | grant | Social & Rehab Services | 2,500 00 |
| Total Be Like Brit Foundation, Inc | | | | 26,500 00 |
| Becker College | | | | |
| 06/15/2016 | Becker College | scholarship | Education - Colleges & Univer | 10,000 00 |
| Total Becker College | | | | 10,000 00 |
| Berea College | | | | |
| 06/15/2016 | Berea College | scholarship | Education - Colleges & Univer | 2,500 00 |
| Total Berea College | | | | 2,500 00 |

The George F. and Sybil H. Fuller Foundation
EIN 04-6125606
2016 Contributions

| Date | Name | Memo | Class | Debit |
|---|---|----------------------|---------------------------------|------------|
| Berlin Memorial School/LINK Parent Org. | | | | |
| 03/03/2016 | Berlin Memorial School/LINK Parent Org | grant | Education - Other | 1,000 00 |
| Total Berlin Memorial School/LINK Parent Org | | | | 1,000 00 |
| Bottom Line | | | | |
| 06/15/2016 | Bottom Line | grant | Other Various Organizations | 5,000 00 |
| Total Bottom Line | | | | 5,000 00 |
| Boylston Public Library Foundation, Inc. | | | | |
| 12/20/2016 | Boylston Public Library Foundation, Inc | grant commitment | Arts, Sciences, Museums, Hist | 100,000 00 |
| Total Boylston Public Library Foundation, Inc | | | | 100,000 00 |
| Calliope Productions, Inc. | | | | |
| 12/02/2016 | Calliope Productions, Inc | grant | Arts, Sciences, Museums, Hist | 1,500 00 |
| Total Calliope Productions, Inc | | | | 1,500 00 |
| Cape Ann YMCA | | | | |
| 06/15/2016 | Cape Ann YMCA | grant | Recreational, Hobbies & Related | 2,500 00 |
| Total Cape Ann YMCA | | | | 2,500 00 |
| CASA Project | | | | |
| 06/15/2016 | CASA Project | grant | Social & Rehab Services | 5,000 00 |
| Total CASA Project | | | | 5,000 00 |
| Central Mass Chabad | | | | |
| 12/21/2016 | Central Mass Chabad | grant | Churches & Related Religious | 5,000 00 |
| Total Central Mass Chabad | | | | 5,000 00 |
| Centro Las Americas | | | | |
| 06/15/2016 | Centro Las Americas | grant | Social & Rehab Services | 3,000 00 |
| Total Centro Las Americas | | | | 3,000 00 |
| Clark University | | | | |
| 01/11/2016 | Clark University | grant commitment | Education - Colleges & Univer | 150,000 00 |
| 06/15/2016 | Clark University | scholarship | Education - Colleges & Univer | 10,000 00 |
| Total Clark University | | | | 160,000 00 |
| Colby-Sawyer College | | | | |
| 06/15/2016 | Colby-Sawyer College | grant | Education - Colleges & Univer | 10,000 00 |
| Total Colby-Sawyer College | | | | 10,000 00 |
| College of the Holy Cross | | | | |
| 06/15/2016 | College of the Holy Cross | scholarship | Education - Colleges & Univer | 10,000 00 |
| Total College of the Holy Cross | | | | 10,000 00 |
| Community Harvest Project | | | | |
| 08/24/2016 | Community Harvest Project | grant for Reliant Fo | Other Various Organizations | 500 00 |
| Total Community Harvest Project | | | | 500 00 |
| Dartmouth College | | | | |
| 06/15/2016 | Dartmouth College | scholarship | Education - Colleges & Univer | 5,000 00 |
| Total Dartmouth College | | | | 5,000 00 |
| Dynamy | | | | |
| 06/15/2016 | Dynamy | grant | Social & Rehab Services | 15,000 00 |
| Total Dynamy | | | | 15,000 00 |

The George F. and Sybil H. Fuller Foundation
EIN 04-6125606
2016 Contributions

| Date | Name | Memo | Class | Debit |
|--|---|------------------|-------------------------------|------------|
| Easter Seals | | | | |
| 06/15/2016 | Easter Seals | scholarship | Health Services & Related | 10,000 00 |
| 12/21/2016 | Easter Seals | grant | Health Services & Related | 10,000 00 |
| Total Easter Seals | | | | 20,000 00 |
| EcoTarium | | | | |
| 02/29/2016 | EcoTarium | grant commitment | Arts, Sciences, Museums, Hist | 100,000 00 |
| 03/03/2016 | EcoTarium | scholarship | Arts, Sciences, Museums, Hist | 9,000 00 |
| 12/07/2016 | EcoTarium | grant | Arts, Sciences, Museums, Hist | 5,000 00 |
| Total EcoTarium | | | | 114,000 00 |
| Edward M. Kennedy Community Health Center | | | | |
| 02/29/2016 | Edward M Kennedy Community Health Center | grant commitment | Health Services & Related | 25,000 00 |
| Total Edward M Kennedy Community Health Center | | | | 25,000 00 |
| Family Services | | | | |
| 06/15/2016 | Family Services | grant | Social & Rehab Services | 10,000 00 |
| Total Family Services | | | | 10,000 00 |
| First Congregational Church | | | | |
| 06/15/2016 | First Congregational Church | grant | Churches & Related Religious | 40,000 00 |
| 12/02/2016 | First Congregational Church | grant | Churches & Related Religious | 10,000 00 |
| Total First Congregational Church | | | | 50,000 00 |
| First Night Worcester | | | | |
| 06/15/2016 | First Night Worcester | grant | Other Various Organizations | 5,000 00 |
| Total First Night Worcester | | | | 5,000 00 |
| Gordon College | | | | |
| 06/15/2016 | Gordon College | scholarship | Education - Colleges & Univer | 10,000 00 |
| Total Gordon College | | | | 10,000 00 |
| Hillside Restoration Project | | | | |
| 12/02/2016 | Hillside Restoration Project | grant | Arts, Sciences, Museums, Hist | 1,000 00 |
| Total Hillside Restoration Project | | | | 1,000 00 |
| Jeremiah's Inn | | | | |
| 12/02/2016 | Jeremiah's Inn | grant | Social & Rehab Services | 2,500 00 |
| Total Jeremiah's Inn | | | | 2,500 00 |
| Joy of Music | | | | |
| 06/15/2016 | Joy of Music | scholarship | Arts, Sciences, Museums, Hist | 6,000 00 |
| Total Joy of Music | | | | 6,000 00 |
| Lasell College | | | | |
| 06/15/2016 | Lasell College | scholarship | Education - Colleges & Univer | 10,000 00 |
| Total Lasell College | | | | 10,000 00 |
| Mass College of Pharmacy & Health Science | | | | |
| 06/15/2016 | Mass College of Pharmacy & Health Science | scholarship | Education - Colleges & Univer | 10,000 00 |
| Total Mass College of Pharmacy & Health Science | | | | 10,000 00 |
| Massachusetts Symphony Orchestra | | | | |
| 04/14/2016 | Massachusetts Symphony Orchestra | grant commitment | Arts, Sciences, Museums, Hist | 15,000 00 |
| 06/15/2016 | Massachusetts Symphony Orchestra | grant | Arts, Sciences, Museums, Hist | 7,500 00 |
| Total Massachusetts Symphony Orchestra | | | | 22,500 00 |

The George F. and Sybil H. Fuller Foundation
EIN 04-6125606
2016 Contributions

| Date | Name | Memo | Class | Debit |
|--|---|----------------------|-------------------------------|------------|
| Mechanics Hall | | | | |
| 06/15/2016 | Mechanics Hall | grant | Arts, Sciences, Museums, Hist | 25,000 00 |
| Total Mechanics Hall | | | | 25,000 00 |
| Music Worcester, Inc. | | | | |
| 03/03/2016 | Music Worcester, Inc | grant | Arts, Sciences, Museums, Hist | 10,000 00 |
| Total Music Worcester, Inc | | | | 10,000 00 |
| Nativity School of Worcester | | | | |
| 06/15/2016 | Nativity School of Worcester | scholarship | Education - Other | 10,000 00 |
| 12/02/2016 | Nativity School of Worcester | grant | Education - Other | 5,000 00 |
| Total Nativity School of Worcester | | | | 15,000 00 |
| NEADS | | | | |
| 12/07/2016 | NEADS | grant | Social & Rehab Services | 5,000 00 |
| Total NEADS | | | | 5,000 00 |
| New Garden Park, Inc | | | | |
| 12/20/2016 | New Garden Park, Inc | grant commitment | Arts, Sciences, Museums, Hist | 100,000 00 |
| Total New Garden Park, Inc | | | | 100,000 00 |
| Nichols College | | | | |
| 06/15/2016 | Nichols College | scholarship | Education - Colleges & Univer | 10,000 00 |
| Total Nichols College | | | | 10,000 00 |
| Northfield Mount Hermon | | | | |
| 06/15/2016 | Northfield Mount Hermon | scholarship | Education - Other | 10,000 00 |
| Total Northfield Mount Hermon | | | | 10,000 00 |
| Old Sturbridge Village | | | | |
| 01/11/2016 | Old Sturbridge Village | grant commitment | Arts, Sciences, Museums, Hist | 50,000 00 |
| 06/15/2016 | Old Sturbridge Village | grant | Arts, Sciences, Museums, Hist | 5,000 00 |
| Total Old Sturbridge Village | | | | 55,000 00 |
| Pakachoag Music School of Greater Worcest | | | | |
| 06/15/2016 | Pakachoag Music School of Greater Worcest | scholarship | Arts, Sciences, Museums, Hist | 3,000 00 |
| Total Pakachoag Music School of Greater Worcest | | | | 3,000 00 |
| Piedmont College | | | | |
| 06/15/2016 | Piedmont College | grant | Education - Colleges & Univer | 1,000 00 |
| Total Piedmont College | | | | 1,000 00 |
| Quinsigamond Community College Foundation | | | | |
| 01/11/2016 | Quinsigamond Community College Foundation | grant commitment | Education - Colleges & Univer | 150,000 00 |
| 06/08/2016 | Quinsigamond Community College Foundation | grant | Education - Colleges & Univer | 10,000 00 |
| Total Quinsigamond Community College Foundation | | | | 160,000 00 |
| Rachel's Table | | | | |
| 06/15/2016 | Rachel's Table | grant | Social & Rehab Services | 10,000 00 |
| Total Rachel's Table | | | | 10,000 00 |
| Rainbow Child Development | | | | |
| 12/21/2016 | Rainbow Child Development | grant | Education - Other | 10,000 00 |
| Total Rainbow Child Development | | | | 10,000 00 |
| Reliant Medical Group Foundation | | | | |
| 02/29/2016 | Reliant Medical Group Foundation | grant commitment | Health Services & Related | 50,000 00 |
| 08/24/2016 | Reliant Medical Group Foundation | grant for Reliant 5K | Health Services & Related | 500 00 |
| Total Reliant Medical Group Foundation | | | | 50,500 00 |

The George F. and Sybil H. Fuller Foundation
EIN 04-6125606
2016 Contributions

| Date | Name | Memo | Class | Debit |
|--|---|------------------|-------------------------------|--------------|
| Saint Joseph's College | | | | |
| 06/15/2016 | Saint Joseph's College | scholarship | Education - Colleges & Univer | 5,000 00 |
| Total Saint Joseph's College | | | | 5,000 00 |
| Salisbury Singers, Inc. | | | | |
| 12/21/2016 | Salisbury Singers, Inc | grant | Arts, Sciences, Museums, Hist | 3,000 00 |
| Total Salisbury Singers, Inc | | | | 3,000 00 |
| Seven Hills Foundation | | | | |
| 06/13/2016 | Seven Hills Foundation | grant | Social & Rehab Services | 25,000 00 |
| Total Seven Hills Foundation | | | | 25,000 00 |
| Simmons College | | | | |
| 06/15/2016 | Simmons College | scholarship | Education - Colleges & Univer | 10,000 00 |
| Total Simmons College | | | | 10,000 00 |
| Southeast Asian Coalition of Central Mass | | | | |
| 06/15/2016 | Southeast Asian Coalition of Central Mass | grant | Social & Rehab Services | 3,000 00 |
| Total Southeast Asian Coalition of Central Mass | | | | 3,000 00 |
| Springfield College | | | | |
| 07/06/2016 | Springfield College | scholarship | Education - Colleges & Univer | 10,000 00 |
| Total Springfield College | | | | 10,000 00 |
| St. John's High School | | | | |
| 12/20/2016 | St John's High School | grant commitment | Education - Other | 50,000 00 |
| Total St John's High School | | | | 50,000 00 |
| Stoneleigh-Burnham School | | | | |
| 06/13/2016 | Stoneleigh-Burnham School | grant | Education - Other | 7,000 00 |
| Total Stoneleigh-Burnham School | | | | 7,000 00 |
| Telegram & Gazette Santa Fund | | | | |
| 11/03/2016 | Telegram & Gazette Santa Fund | grant | Other Various Organizations | 1,500 00 |
| Total Telegram & Gazette Santa Fund | | | | 1,500 00 |
| Temple Emanuel Sinai | | | | |
| 12/21/2016 | Temple Emanuel Sinai | grant | Churches & Related Religious | 50,000 00 |
| Total Temple Emanuel Sinai | | | | 50,000 00 |
| The Barton Center | | | | |
| 06/15/2016 | The Barton Center | scholarships | Health Services & Related | 11,500 00 |
| Total The Barton Center | | | | 11,500 00 |
| The Hanover Theatre | | | | |
| 01/11/2016 | The Hanover Theatre | grant commitment | Arts, Sciences, Museums, Hist | 100,000 00 |
| Total The Hanover Theatre | | | | 100,000 00 |
| The Research Bureau | | | | |
| 06/15/2016 | The Research Bureau | grant | Other Various Organizations | 10,000 00 |
| Total The Research Bureau | | | | 10,000 00 |
| Tower Hill Botanic Garden | | | | |
| 06/15/2016 | Tower Hill Botanic Garden | grant | Arts, Sciences, Museums, Hist | 15,000 00 |
| 12/02/2016 | Tower Hill Botanic Garden | grant | Arts, Sciences, Museums, Hist | 2,500 00 |
| 12/21/2016 | Tower Hill Botanic Garden | grant | Arts, Sciences, Museums, Hist | 25,000 00 |
| Total Tower Hill Botanic Garden | | | | 42,500 00 |

The George F. and Sybil H. Fuller Foundation
EIN 04-6125606
2016 Contributions

| Date | Name | Memo | Class | Debit |
|--|---------------------------------------|------------------|-------------------------------|------------|
| Tufts University | | | | |
| 06/15/2016 | Tufts University | grant | Education - Colleges & Univer | 10,000 00 |
| Total Tufts University | | | | 10,000 00 |
| UMass Med. School/UMass Memorial Found. | | | | |
| 06/15/2016 | UMass Med School/UMass Memorial Found | grant commitment | Health Services & Related | 60,000 00 |
| 06/15/2016 | UMass Med School/UMass Memorial Found | scholarship | Education - Colleges & Univer | 10,000 00 |
| Total UMass Med School/UMass Memorial Found | | | | 70,000 00 |
| United Way of Central Massachusetts | | | | |
| 02/29/2016 | United Way of Central Massachusetts | grant commitment | Social & Rehab Services | 120,000 00 |
| Total United Way of Central Massachusetts | | | | 120,000 00 |
| Why Me & Sherry's House | | | | |
| 06/15/2016 | Why Me & Sherry's House | grant | Social & Rehab Services | 5,000 00 |
| Total Why Me & Sherry's House | | | | 5,000 00 |
| Worcester Academy | | | | |
| 03/03/2016 | Worcester Academy | scholarship | Education - Other | 10,000 00 |
| Total Worcester Academy | | | | 10,000 00 |
| Worcester Area Mission Society | | | | |
| 06/15/2016 | Worcester Area Mission Society | grant | Churches & Related Religious | 3,000 00 |
| Total Worcester Area Mission Society | | | | 3,000 00 |
| Worcester Art Museum | | | | |
| 06/15/2016 | Worcester Art Museum | grant commitment | Arts, Sciences, Museums, Hist | 250,000 00 |
| Total Worcester Art Museum | | | | 250,000 00 |
| Worcester Education Collaborative | | | | |
| 03/03/2016 | Worcester Education Collaborative | grant | Education - Other | 25,000 00 |
| Total Worcester Education Collaborative | | | | 25,000 00 |
| Worcester Educational Dev. Foundation | | | | |
| 03/03/2016 | Worcester Educational Dev Foundation | Grant commitment | Education - Other | 5,000 00 |
| 05/04/2016 | Worcester Educational Dev Foundation | grant commitment | Education - Other | 15,000 00 |
| Total Worcester Educational Dev Foundation | | | | 20,000 00 |
| Worcester Historical Museum | | | | |
| 06/15/2016 | Worcester Historical Museum | grant commitment | Arts, Sciences, Museums, Hist | 150,000 00 |
| Total Worcester Historical Museum | | | | 150,000 00 |
| Worcester Polytechnic Institute | | | | |
| 01/11/2016 | Worcester Polytechnic Institute | grant commitment | Education - Colleges & Univer | 200,000 00 |
| 06/15/2016 | Worcester Polytechnic Institute | grant | Education - Colleges & Univer | 10,000 00 |
| Total Worcester Polytechnic Institute | | | | 210,000 00 |
| Worcester Reg. Chamber of Commerce | | | | |
| 12/21/2016 | Worcester Reg Chamber of Commerce | grant | Other Various Organizations | 15,000 00 |
| Total Worcester Reg Chamber of Commerce | | | | 15,000 00 |
| Worcester State University | | | | |
| 01/11/2016 | Worcester State University | grant commitment | Education - Colleges & Univer | 100,000 00 |
| 06/15/2016 | Worcester State University | grant | Education - Colleges & Univer | 10,000 00 |
| Total Worcester State University | | | | 110,000 00 |
| Worcester Youth Center | | | | |
| 12/21/2016 | Worcester Youth Center | grant | Youth Organizations | 6,500 00 |
| Total Worcester Youth Center | | | | 6,500 00 |

The George F. and Sybil H. Fuller Foundation

EIN 04-6125606

2016 Contributions

| <u>Date</u> | <u>Name</u> | <u>Memo</u> | <u>Class</u> | <u>Debit</u> |
|------------------------------|-----------------------|-------------------|---------------------------------|---------------------|
| Working For Worcester | | | | |
| 03/03/2016 | Working For Worcester | GRANT | Education - Other | 5,000 00 |
| Total Working For Worcester | | | | 5,000 00 |
| YMCA of Central Mass | | | | |
| 01/11/2016 | YMCA of Central Mass | grant commitment | Recreational, Hobbies & Related | 250,000 00 |
| 03/03/2016 | YMCA of Central Mass | 2016 Annual | Recreational, Hobbies & Related | 20,000 00 |
| 06/15/2016 | YMCA of Central Mass | grant | Recreational, Hobbies & Related | 10,000 00 |
| 06/15/2016 | YMCA of Central Mass | grant | Recreational, Hobbies & Related | 1,000 00 |
| 08/24/2016 | YMCA of Central Mass | Boroughs Branch R | Recreational, Hobbies & Related | 500 00 |
| Total YMCA of Central Mass | | | | 281,500 00 |
| YouthConnect Summer | | | | |
| 03/03/2016 | YouthConnect Summer | grant | Youth Organizations | 3,000 00 |
| Total YouthConnect Summer | | | | 3,000 00 |
| TOTAL | | | | 2,951,500.00 |