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Form 990-PF

Department of the Treasury  
Internal Revenue Service

## Return of Private Foundation

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

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Information about Form 990-PF and its separate instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

OMB No 1545-0052

2016

Open to Public Inspection

For calendar year 2016 or tax year beginning

, and ending

Name of foundation <b>THE ORCHARD FOUNDATION C/O LEIGH FIBERS INC.</b>		A Employer identification number <b>04-6660214</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>100 LEDGEWOOD PLACE, SUITE 103</b>		B Telephone number <b>207-799-0686</b>
City or town, state or province, country, and ZIP or foreign postal code <b>ROCKLAND, MA 02370</b>		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) <b>\$ 9,372,299.</b> (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 <input type="checkbox"/>
J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____		

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))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received		10,000.		N/A	
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		169,717.	169,717.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		199,293.			
b Gross sales price for all assets on line 6a		2,329,812.			
7 Capital gain net income (from Part IV, line 2)			199,293.		
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)					
11 Other income		3,287.	802.		STATEMENT 2
12 Total. Add lines 1 through 11		382,297.	369,812.		
13 Compensation of officers, directors, trustees, etc.		60,000.	0.		60,000.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 3		4,600.	0.		0.
c Other professional fees STMT 4		75,476.	75,476.		0.
17 Interest					
18 Taxes STMT 5		4,805.	4,805.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 6		5,801.	0.		3,396.
24 Total operating and administrative expenses. Add lines 13 through 23		150,682.	80,281.		63,396.
25 Contributions, gifts, grants paid		2,263,282.			2,263,282.
26 Total expenses and disbursements. Add lines 24 and 25		2,413,964.	80,281.		2,326,678.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-2,031,667.			
b Net investment income (if negative, enter -0-)			289,531.		
c Adjusted net income (if negative, enter -0-)				N/A	

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**THE ORCHARD FOUNDATION**  
**C/O LEIGH FIBERS INC.**

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<b>Part II Balance Sheets</b> Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash - non-interest-bearing	14,271.	5,514.	5,514.
	2 Savings and temporary cash investments	93,095.	148,096.	148,096.
	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			
	7 Other notes and loans receivable ▶ 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			
	b Investments - corporate stock <b>STMT 7</b>	5,267,643.	4,649,375.	6,081,878.
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶ Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment: basis ▶ Less: accumulated depreciation ▶			
15 Other assets (describe ▶ <b>STATEMENT 8</b> )	4,198,887.	2,739,244.	3,136,811.	
16 <b>Total assets</b> (to be completed by all filers - see the instructions. Also, see page 1, item I)	9,573,896.	7,542,229.	9,372,299.	
<b>Liabilities</b>	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			
	22 Other liabilities (describe ▶ )			
23 <b>Total liabilities</b> (add lines 17 through 22)	0.	0.		
<b>Net Assets or Fund Balances</b>	Foundations that follow SFAS 117, check here <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	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	9,573,896.	7,542,229.	
30 <b>Total net assets or fund balances</b>	9,573,896.	7,542,229.		
31 <b>Total liabilities and net assets/fund balances</b>	9,573,896.	7,542,229.		

**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	9,573,896.
2 Enter amount from Part I, line 27a	2	-2,031,667.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	7,542,229.
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	7,542,229.

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**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 WILMINGTON TRUST		VARIOUS	12/31/16
b WILMINGTON TRUST		VARIOUS	12/31/16
c SANDERSON INTERNATIONAL TOBACCO FREE FUND		VARIOUS	12/31/16
d SANDERSON INTERNATIONAL TOBACCO FREE FUND		VARIOUS	12/31/16
e CAPITAL GAINS DIVIDENDS			

(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 570,485.		560,621.	9,864.
b 1,743,332.		1,565,079.	178,253.
c		4,819.	-4,819.
d 5,621.			5,621.
e 10,374.			10,374.

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

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			9,864.
b			178,253.
c			-4,819.
d			5,621.
e			10,374.

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	199,293.
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). If (loss), enter -0- in Part I, line 8		3	N/A

**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	1,080,762.	12,137,223.	.089045
2014	811,161.	12,935,581.	.062708
2013	656,865.	12,429,984.	.052845
2012	1,016,788.	11,917,210.	.085321
2011	1,924,466.	13,230,303.	.145459

2 Total of line 1, column (d)	2	.435378
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	.087076
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	10,202,153.
5 Multiply line 4 by line 3	5	888,363.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,895.
7 Add lines 5 and 6	7	891,258.
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	2,326,678.

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**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 checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	2,895.
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	2,895.
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	2,895.
6	Credits/Payments:		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	13,149.
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	13,149.
8	Enter any penalty for underpayment of estimated tax. Check here <input checked="" 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	10,254.
11	Enter the amount of line 10 to be: Credited to 2017 estimated tax <input checked="" type="checkbox"/> 10,254. Refunded <input checked="" type="checkbox"/> 0.	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?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? 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		X
1c 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. \$ 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? If "Yes," attach a detailed description of the activities		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? If "Yes," attach a conformed copy of the changes		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? If "Yes," attach the statement required by General Instruction T		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? If "Yes," complete Part II, col. (c), and Part XIV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <u>MA</u>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	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)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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**THE ORCHARD FOUNDATION**  
**C/O LEIGH FIBERS INC.**

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**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)	11	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)	12	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <b>HTTP://WWW.ORCHARDFOUNDATION.ORG</b>	13	X
14 The books are in care of ► <b>BRIGITTE LEHNER KINGSBURY, EXEC DIR</b> Telephone no. ► <b>207-799-0686</b> Located at ► <b>C/O LEIGH FIBERS, 100 LEDGEWOOD PL, ROCKLAND, MA</b> ZIP+4 ► <b>02370</b>		
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	N/A
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 ►	16	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 checked="" type="checkbox"/> Yes <input 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	1b	X
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	X
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 ►	<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.)	2b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
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)	3b	N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	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?	4b	X

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**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)?

Organizations relying on a current notice regarding disaster assistance check here

N/A ☐

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?

N/A ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If "Yes" to 6b, file Form 8870

6b X

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

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.

(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
CARL P. LEHNER	TRUSTEE			
C/O LEIGH FIBERS, 100 LEDGEWOOD PLACE	0.00	0.	0.	0.
ROCKLAND, MA 02370				
BRIGITTE L. KINGSBURY	TR & EXEC DIR			
C/O LEIGH FIBERS, 100 LEDGEWOOD PLACE	20.00	60,000.	0.	0.
ROCKLAND, MA 02370				
HEIDI LEHNER	TRUSTEE			
C/O LEIGH FIBERS, 100 LEDGEWOOD PLACE	0.00	0.	0.	0.
ROCKLAND, MA 02370				

2 Compensation of five highest-paid employees (other than those included on line 1). 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

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

**3 Five highest-paid independent contractors for professional services. If none, enter "NONE."**

[illegible]

**Total** number of others receiving over \$50,000 for professional services

0

<b>Part IX-A</b>	<b>Summary of Direct Charitable Activities</b>
------------------	--

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	N/A	
2		
3		
4		

<b>Part IX-B</b>	<b>Summary of Program-Related Investments</b>
------------------	---

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		
3	All other program-related investments. See instructions.	
Total. Add lines 1 through 3		0.

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**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	10,081,446.
b	Average of monthly cash balances	1b	276,070.
c	Fair market value of all other assets	1c	
d	<b>Total</b> (add lines 1a, b, and c)	1d	10,357,516.
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	10,357,516.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	155,363.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	10,202,153.
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	510,108.

**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	510,108.
2a	Tax on investment income for 2016 from Part VI, line 5	2a	2,895.
b	Income tax for 2016. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2,895.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	507,213.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	507,213.
6	Deduction from distributable amount (see instructions)	6	0.
7	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	507,213.

**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	2,326,678.
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	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	2,326,678.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	2,895.
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	2,323,783.

**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.

Form 990-PF (2016)

**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				507,213.
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2016:				
a From 2011	1,267,913.			
b From 2012	427,666.			
c From 2013	43,128.			
d From 2014	179,271.			
e From 2015	475,640.			
f Total of lines 3a through e	2,393,618.			
4 Qualifying distributions for 2016 from Part XII, line 4: ▶ \$ 2,326,678.				
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				507,213.
e Remaining amount distributed out of corpus	1,819,465.			
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:	4,213,083.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2015. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2016. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2017				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2011 not applied on line 5 or line 7	1,267,913.			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	2,945,170.			
10 Analysis of line 9:				
a Excess from 2012	427,666.			
b Excess from 2013	43,128.			
c Excess from 2014	179,271.			
d Excess from 2015	475,640.			
e Excess from 2016	1,819,465.			

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

N/A

**1 a** 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 foundation is a private operating foundation described in section

	4942(i)(3) or		4942(i)(5)
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**2 a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

b 85% of line 2a

**c** Qualifying distributions from Part XII,  
line 4 for each year listed

**d** Amounts included in line 2c not used directly for active conduct of exempt activities

**e** Qualifying distributions made directly for active conduct of exempt activities.

Subtract line 2d from line 2c

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

a "Assets" alternative test - enter:  
(1) Value of all assets

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

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

c "Support" alternative test - enter:

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

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

**(3) Largest amount of support from an exempt organization**

**(4) Gross investment income**

<b>Part XV</b>	<b>Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.)</b>
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### 1 Information Regarding Foundation Managers:

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

SEE STATEMENT 9

**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.

NONE

**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 e-mail address of the person to whom applications should be addressed:

SEE ATTACHED INFORMATION

**b The form in which applications should be submitted and information and materials they should include:**

SEE ATTACHED INFORMATION

**c Any submission deadlines:**

SEE ATTACHED INFORMATION

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

SEE ATTACHED INFORMATION

**THE ORCHARD FOUNDATION**  
**C/O LEIGH FIBERS INC.**

**Part XV** **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	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
<b>a Paid during the year</b>				
ALL RECIPIENTS ARE PUBLIC CHARITIES:				
SEE ATTACHED SCHEDULE (THERE ARE NO INDIVIDUAL RECIPIENTS)			SEE ATTACHED SCHEDULE	2,263,282.
<b>Total</b>			<b>3a</b>	2,263,282.
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>			<b>3b</b>	0.

**Part XVI-A Analysis of Income-Producing Activities**

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
	(a) Business code	(b) Amount	(c) Exclu- sion 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	169,717.		
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			14	3,287.		
8 Gain or (loss) from sales of assets other than inventory			18	199,293.		
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.		372,297.		0.
13 Total. Add line 12, columns (b), (d), and (e)						

(See worksheet in line 13 instructions to verify calculations.)

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

[illegible]

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

		Yes	No
<b>1</b>	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?		
<b>a</b>	Transfers from the reporting foundation to a noncharitable exempt organization of:		
	(1) Cash	1a(1)	X
	(2) Other assets	1a(2)	X
<b>b</b>	Other transactions:		
	(1) Sales of assets to a noncharitable exempt organization	1b(1)	X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)	X
	(3) Rental of facilities, equipment, or other assets	1b(3)	X
	(4) Reimbursement arrangements	1b(4)	X
	(5) Loans or loan guarantees	1b(5)	X
	(6) Performance of services or membership or fundraising solicitations	1b(6)	X
<b>c</b>	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c	X
<b>d</b>	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.		

[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** Bongtho Leha Kingphom 5/10/17 Executive Director

Signature of officer or trustee Date Title

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

<b>Paid Preparer Use Only</b>	Print/Type preparer's name	Preparer's signature 	Date 05/04/17	Check <input type="checkbox"/> if self-employed	PTIN P00354967
	Firm's name ▶ CBIZ TOFIAS			Firm's EIN ▶ 26-3753134	
	Firm's address ▶ 500 BOYLSTON STREET BOSTON, MA 02116			Phone no. 617-761-0600	

Form **990-PF** (2016)

**Schedule B**  
(Form 990, 990-EZ,  
or 990-PF)

Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.  
▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and  
its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No 1545-0047

**2016**

Name of the organization

THE ORCHARD FOUNDATION  
C/O LEIGH FIBERS INC.

Employer identification number

04-6660214

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 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 33 1/3% 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. Don't 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 isn't covered by the General Rule and/or the Special Rules doesn't 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 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

**LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2016)**

Name of organization  
**THE ORCHARD FOUNDATION**  
**C/O LEIGH FIBERS INC.**

Employer identification number

04-6660214

**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	LEIGH FIBERS HOLDINGS INC 100 LEDGEWOOD PLACE #103 ROCKLAND, MA 02370	\$ 10,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)



Name of organization <b>THE ORCHARD FOUNDATION C/O LEIGH FIBERS INC.</b>	Employer identification number <b>04-6660214</b>
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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
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

Name of organization <b>THE ORCHARD FOUNDATION C/O LEIGH FIBERS INC.</b>	Employer identification number <b>04-6660214</b>
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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 info once) ▶ \$ \_\_\_\_\_  
Use duplicate copies of Part III if additional space is needed.

(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

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FORM 990-PF                      DIVIDENDS AND INTEREST FROM SECURITIES                      STATEMENT      1

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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
SANDERSON INT'L VALUE TABACCO FREE FUND	35,982.	0.	35,982.	35,982.	
WILMINGTON REALTY I, LLC	755.	0.	755.	755.	
WILMINGTON TRUST - DIVIDENDS	143,354.	10,374.	132,980.	132,980.	
TO PART I, LINE 4	180,091.	10,374.	169,717.	169,717.	

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FORM 990-PF                      OTHER INCOME                      STATEMENT      2

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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
OTHER INVESTMENT INCOME	802.	802.	
NONDIVIDEND DISTRIBUTION	2,485.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	3,287.	802.	

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FORM 990-PF                      ACCOUNTING FEES                      STATEMENT      3

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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX PREPARATION AND ACCOUNTING FEES	4,600.	0.		0.
TO FORM 990-PF, PG 1, LN 16B	4,600.	0.		0.

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FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	75,476.	75,476.		0.
TO FORM 990-PF, PG 1, LN 16C	75,476.	75,476.		0.

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FORM 990-PF	TAXES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	4,805.	4,805.		0.
TO FORM 990-PF, PG 1, LN 18	4,805.	4,805.		0.

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FORM 990-PF	OTHER EXPENSES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OFFICE EXPENSE	1,101.	0.		1,101.
TELEPHONE/INTERNET	1,111.	0.		1,111.
STATE FILING FEES	70.	0.		0.
CONFERENCES & MEETINGS	154.	0.		154.
BANK FEES	69.	0.		0.
INSURANCE	2,266.	0.		0.
TRAVEL	1,030.	0.		1,030.
TO FORM 990-PF, PG 1, LN 23	5,801.	0.		3,396.

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FORM 990-PF	CORPORATE STOCK	STATEMENT	7
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
MUTUAL FUNDS	4,649,375.	6,081,878.
TOTAL TO FORM 990-PF, PART II, LINE 10B	4,649,375.	6,081,878.

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FORM 990-PF	OTHER ASSETS	STATEMENT	8
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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
RODNEY SQUARE REALTY I LLC	389,780.	385,786.	33,607.
SANDERSON INT'L TOBACCO FREE FUND	1,016,940.	1,041,291.	1,071,276.
WEATHERLOW OFFSHORE FUND I LTD	1,592,167.	1,067,167.	1,566,356.
ARCHSTONE OFFSHORE FUND LTD	1,200,000.	245,000.	465,572.
TO FORM 990-PF, PART II, LINE 15	4,198,887.	2,739,244.	3,136,811.

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FORM 990-PF	PART XV - LINE 1A LIST OF FOUNDATION MANAGERS	STATEMENT	9
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## NAME OF MANAGER

CARL P. LEHNER  
BRIGITTE L. KINGSBURY  
HEIDI LEHNER

# **ORCHARD FOUNDATION GRANTS LIST 2016**

**Legal address:**  
c/o Leigh Fibers  
100 Ledgewood Place, Suite 103  
Rockland, MA 02370

**Mailing address:**  
c/o Ms. Brigitte L. Kingsbury, Executive Director  
PO Box 2587  
So. Portland, ME 04116

<b>Recipient</b>	<b>Purpose</b>	<b>Amount (\$)</b>
American Civil Liberties Union Foundation 125 Broad Street, 18 <sup>th</sup> floor New York, NY 10004	General Operating Support	1,000 00
American Friends for the Preservation of Czech Culture P.O. Box 814 Dover, MA 02030	Museum	500.00
Arthritis Foundation: Massachusetts Chapter 29 Crafts Street, Suite 450 Newton, MA 02458-1275	General Operating Support	350.00
Beacon Academy 477 Longwood Avenue Boston, MA 02215	General Operating Support	1000.00
Brigham and Women's Hospital Ann Romney Center for Neurologic Diseases 116 Huntington Avenue, 3 <sup>rd</sup> floor Boston, MA 02115	Alzheimer's Center research	25,000.00
Brigham and Women's Hospital The Gillian Reny Stepping Strong Fund 116 Huntington Avenue, 3 <sup>rd</sup> floor Boston, MA 02116	General Operating Support (1)	10,000.00
Brigham and Women's Hospital The Gillian Reny Stepping Strong Fund 116 Huntington Avenue, 3 <sup>rd</sup> floor Boston, MA 02116	General Operating Support (2)	5,000.00
Buckingham Browne & Nichols School 80 Gerry's Landing Road Cambridge, MA 02138-5595	Annual Fund (1)	2,000.00
Buckingham Browne & Nichols School 80 Gerry's Landing Road Cambridge, MA 02138-5595	Annual Fund (2)	1,000.00
Buckingham Browne & Nichols School 80 Gerry's Landing Road Cambridge, MA 02138-5595	Financial Aid Endowment Fund	5,000 00
The CAIR Project P. O. Box 17121 Seattle, WA 98127	General Operating Support	1,000.00

Chewonki Foundation 485 Chewonki Neck Road Wiscasset, ME 04578	General Operating Support (1)	1,000.00
Chewonki Foundation 485 Chewonki Neck Road Wiscasset, ME 04578	General Operating Support (2)	2,000.00
Chewonki Foundation 485 Chewonki Neck Road Wiscasset, ME 04578	General Operating Support (3)	1,000.00
Children's Hospital Trust/Boston 401 Park Drive, 6 <sup>th</sup> floor Boston, MA 02215	Chair in Rheumatology	165,000.00
Children's Hospital Trust/Boston 401 Park Drive, 6 <sup>th</sup> floor Boston, MA 02215	Division of Developmental Medicine Program	25,000.00
Colby College 4329 Mayflower Hill Waterville, ME 04901	Friends of Colby Crew	2,000.00
Concord Academy 166 Main Street Concord, MA 01742	Annual Fund	2,000 00
Conservation Law Foundation 62 Summer Street Boston, MA 02110	General Operating Support for Maine Advocacy Office	10,000 00
Conservation Law Foundation 62 Summer Street Boston, MA 02110	General Operating Support for New Hampshire Advocacy Office	1,000 00
Conservation Law Foundation 62 Summer Street Boston, MA 02110	Leadership Campaign	12,000.00
Earthjustice 50 California Street, Suite 500 San Francisco, CA 94111	General Operating Support (1)	5,000.00
Earthjustice 50 California Street, Suite 500 San Francisco, CA 94111	General Operating Support (2)	35,000.00
Earthjustice 50 California Street, Suite 500 San Francisco, CA 94111	General Operating Support (3)	50,000.00
Environmental Grantmakers Association 475 Riverside Drive, Suite 960 New York, NY 10115	General Operating Support	2,656.00

Equality Now! P.O. Box 20646, Columbus Circle Station New York, NY 10023	General Funds	50,000.00
Exponent Philanthropy 1720 N Street, NW Washington DC 20036	General Operating Support	750.00
First Parish in Cohasset 23 North Main Street Cohasset, MA 02025	General Operating Support (1)	5,000.00
First Parish in Cohasset 23 North Main Street Cohasset, MA 02025	General Operating Support (2)	5,000.00
Friends of the Brooklyn New School 610 Henry Street Brooklyn, NY 11231	General Support (1)	\$3,000.00
Friends of the Brooklyn New School 610 Henry Street Brooklyn, NY 11231	General Support (2)	\$3,000.00
Friends of the Holderness Free Library P.O. Box L Holderness, NH 03245	Campaign for the Holderness Free Library	10,000.00
Glastonbury Abbey-Benedictine Monks 16 Hull Street Hingham, MA 02043	General Operating Support	3,000.00
Grace Church 78 Main Street Hastings-on-Hudson, NY 10706	General Operating Support	6,000.00
Hearth, Inc. 1640 Washington Street Boston, MA 02118	General Operating Support	5,000.00
High Mountain Institute 531 County Road 5A Leadville, CO 80461	HMI Campaign	5,000.00
High Mountain Institute 531 County Road 5A Leadville, CO 80461	Campaign for Community	30,000.00
Himalayan Education Foundation 49 Pine Street Peterborough, NH 03458	General Operating Support	2,000.00
Hingham Historical Society PO Box 434 Hingham, MA 02043	General Operating Support	1,500.00



Hingham Land Conservation Trust P.O. Box 10 Hingham, MA 02043	General Operating Support	1,500.00
Island Academy POB W1884 St. Johns, Antigua, West Indies	Scholarship Fund	10,000.00
The Lahey Clinic Foundation 41 Mall Road Burlington, MA 01805	Emergency Department	50,000.00
Maine Conservation Alliance 295 Water Street, Suite 9 Augusta, ME 04330	General Operating Support	10,000.00
Maine Philanthropy Center P.O. Box 9301 - USM Glickman Family Library Portland, ME 04104-9301	General Operating Support	700.00
Massachusetts Institute of Technology 600 Memorial Drive, 3 <sup>rd</sup> floor Cambridge, MA 02139-4819	Mechanical Engineering Department	80,000.00
The MacDowell Colony 163 East 81 <sup>st</sup> Street New York, NY 10028	NYC Space	2,000.00
The MacDowell Colony 163 East 81 <sup>st</sup> Street New York, NY 10028	General Operating Support	6,000.00
McLean Hospital Neuroregeneration Research Institute 115 Mill Street Belmont, MA 02478	Parkinson's Disease Research	146,000.00
Medecins Sans Frontieres USA 333 7 <sup>th</sup> Avenue New York, NY 10001-5004	General Operating Support (1)	1,000.00
Medecins Sans Frontieres USA 333 7 <sup>th</sup> Avenue New York, NY 10001-5004	General Operating Support (2)	3,000.00
Middlebury College Office of College Advancement Munford House Middlebury, VT 05753	Environmental Program Fund (1)	5,000.00
Middlebury College Office of College Advancement Munford House Middlebury, VT 05753	Environmental Program Fund (2)	25,000.00

Middlebury College Office of College Advancement Munford House Middlebury, VT 05753	Financial Aid	500.00
The Monadnock Conservancy POB 337 Keene, NH 03431	General Operating Support (1)	5,000.00
The Monadnock Conservancy POB 337 Keene, NH 03431	General Operating Support (2)	10,000.00
Museum of Fine Arts 465 Huntington Avenue Boston, MA 02115	General Purposes	12,000.00
National Ability Center P. O. Box 682799 Park City, UT 84068	General Operating Support	5,000.00
Natural Resources Council of Maine 3 Wade Street Augusta, ME 04330	General Operating Support	5,000.00
New Hampshire Institute of Art Sharon Arts Center 457 NH Route 123 Sharon, NH 03458-9014	General Support for Sharon Arts Center	1,000.00
Old Road Fund P.O. Box 494 St John's, Antigua West Indies	General Purposes	4,000.00
Park City Community Foundation P. O. Box 681499 Park City, UT 84068	General Operating Support	5,000.00
Physicians for Reproductive Health 55 West 39 <sup>th</sup> Street, Suite 1001 New York, NY 10018	Project Support	10,000.00
Planned Parenthood Federation of America 123 William Street, 10 <sup>th</sup> floor New York, NY 10038	General Operating Support (1)	1,000.00
Planned Parenthood Federation of America 123 William Street, 10 <sup>th</sup> floor New York, NY 10038	General Operating Support (2)	2,000.00
Rachel's Network 1200 18 <sup>th</sup> Street NW, Suite 310 Washington DC 20036	General Operating Support	5,000.00

Rainforest Alliance 233 Broadway, 28 <sup>th</sup> Floor New York, NY 10279	General Operating Support	10,000.00
The Salvation Army 25 Shawmut Road Canton, MA 02021	General Operating Support	5,000.00
Scenic Hudson 9 Vasser Street Poughkeepsie, NY 12601-3091	General Operating Support (1)	15,000.00
Scenic Hudson 9 Vasser Street Poughkeepsie, NY 12601-3091	General Operating Support (2)	10,000.00
Smith College Alumnae Fund 33 Elm Street Northampton, MA 01063-0024	Annual Fund and the Ada Comstock Scholars Program	2,000.00
The Spartanburg County Foundation 424 E. Kennedy Street Spartanburg, SC 29302	Donor-Advised Fund (1)	100,000.00
The Spartanburg County Foundation 424 E. Kennedy Street Spartanburg, SC 29302	Donor-Advised Fund (2)	100,000.00
St. Andrew's School 350 Noxontown Road Middletown, DE 19709-1605	General Operating Support	1,000.00
St. Paul's Parish 147 North Street Hingham, MA 02043	General Operating Support	3,000.00
Trustees of Hampshire College Institutional Advancement, Hampshire College 893 West Street Amherst, MA 01002	Writing Program	5,000.00
The Trustees of Reservations 572 Essex Street Beverly, MA 01915-1530	General Operating Support	1,500.00
Untermeyer Gardens Conservancy 945 North Broadway Yonkers, NY 10701	General Operating Support	500.00
Vanguard Charitable P.O. Box 55766 Boston, MA 02205	Donor-Advised Fund	1,101,326.00

Washington Heights Corner Project 566 West 181 <sup>st</sup> Street, 2 <sup>nd</sup> floor New York, NY 10033	General Operating Support	500 00
Waterkeeper Alliance 180 Maiden Lane, Suite 603 New York, NY 10038	General Operating Support	5,000.00
WBUR - Radio 90.9 FM 890 Commonwealth Avenue Boston, MA 02215	WBUR Radio Station Fund/ General Operating Support	1,500.00
WGBH - Channel 2 125 Western Avenue Boston, MA 02134	General Operating Support	1,500.00
	<b>Total 2016 Contributions:</b>	<b>\$ 2,263,282</b>