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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)			
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	268,700	568,807	568,807
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	901	901	
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	7,878,398	8,910,893	8,910,893
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	8,147,999	9,480,601	9,479,700	
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	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ☐ and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ☒ and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	8,147,999	9,480,601	
	30	Total net assets or fund balances (see instructions)	8,147,999	9,480,601	
31	Total liabilities and net assets/fund balances (see instructions) .	8,147,999	9,480,601		

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	8,147,999
2	Enter amount from Part I, line 27a	2	682,646
3	Other increases not included in line 2 (itemize) ▶ _____	3	649,956
4	Add lines 1, 2, and 3	4	9,480,601
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	9,480,601

Part IV Capital Gains and Losses for Tax on Investment Income

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

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

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

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	-13,190
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	-23,775

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

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

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

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



Yes



No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2015	423,952	8,418,988	0 05036
2014	433,070	8,897,965	0 04867
2013	406,075	8,452,979	0 04804
2012	391,165	7,956,955	0 04916
2011	396,034	7,844,210	0 05049
2 Total of line 1, column (d)			2 0 246714
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 049343
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5			4 9,112,048
5 Multiply line 4 by line 3			5 449,616
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 1,734
7 Add lines 5 and 6			7 451,350
8 Enter qualifying distributions from Part XII, line 4			8 462,070

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	1	1,734
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	
3	Add lines 1 and 2.	3	1,734
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	1,734
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	4,800
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	4,800
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed ▶	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid . . . ▶	10	3,066
11	Enter the amount of line 10 to be Credited to 2017 estimated tax ▶ 3,066 Refunded ▶	11	

Part VII-A Statements Regarding Activities

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

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	Yes	
14	The books are in care of ► American Research & Management Telephone no ► (508) 748-1611			

Located at **►** 145 Front Street Marion MA ZIP+4 **►** 02738

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ☐ and enter the amount of tax-exempt interest received or accrued during the year ► 15			
16	At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes," enter the name of the foreign country ►	16	Yes	No

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

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

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

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

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

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
See Additional Data Table				
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
NONE				
Total number of other employees paid over \$50,000. ☐ Yes ☒ No				

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

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

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

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1	
2	
3	
4	

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

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

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	8,533,566
b	Average of monthly cash balances.	1b	717,244
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	9,250,810
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	
3	Subtract line 2 from line 1d.	3	9,250,810
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	138,762
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	9,112,048
6	Minimum investment return. Enter 5% of line 5.	6	455,602

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	455,602
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	1,734
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,734
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	453,868
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	453,868
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	453,868

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	462,070
b	Program-related investments—total from Part IX-B.	1b	
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	462,070
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	1,734
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	460,336

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				453,868
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only.			6,329	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2016				
a From 2011.				
b From 2012.				
c From 2013.				
d From 2014.				
e From 2015.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ <u>462,070</u>				
a Applied to 2015, but not more than line 2a			6,329	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2016 distributable amount.				453,868
e Remaining amount distributed out of corpus	1,873			
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:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	1,873			
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).				
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	1,873			
10 Analysis of line 9				
a Excess from 2012.				
b Excess from 2013.				
c Excess from 2014.				
d Excess from 2015.				
e Excess from 2016.	1,873			

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

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

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

1 Information Regarding Foundation Managers:	
a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))	
b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest	
2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:	
Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.	
a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed Neil Van Sloun Scotch Pine Lane PO Box 116 Westport, MA 02791 (508) 636-4573	
b The form in which applications should be submitted and information and materials they should include Letter requesting funds	
c Any submission deadlines None	
d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors None	

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
a <i>Paid during the year</i> See Additional Data Table				
Total			▶ 3a	432,000
b <i>Approved for future payment</i>				
Total			▶ 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

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.**5** Net rental income or (loss) from real estate

a Debt-financed property.

b Not debt-financed property.

6 Net rental income or (loss) from personal property**7** Other investment income.**8** Gain or (loss) from sales of assets other than inventory**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).**13 Total.** Add line 12, columns (b), (d), and (e). **13** 210,532
(See worksheet in line 13 instructions to verify calculations)**Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes****Line No.**

Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)

Part XVII

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

[illegible]

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

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

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

**Sign
Here**

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

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

**Paid
Preparer
Use Only**

Print/Type preparer's name Joseph L McArdle Jr CPA	Preparer's Signature	Date	Check if self-employed ☐	PTIN P00146401
Firm's name ► BENOIT & MCARDLE PC				Firm's EIN ►
Firm's address ► 240 WAREHAM RD - P O BOX 1037 MARION, MA 027381037				Phone no (508) 748-1611

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

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
800 Shs Gilead Sciences	P	2016-01-01	2016-12-22
100 Shs IShares NASDAQ	P	2016-05-11	2016-12-23
1000 Shs Novo-Nordisk	P	2016-03-23	2016-12-22
350 Shs SPDR S & P Biotech ETF	P	2016-05-11	2016-12-23
200 Shs Gilead Sciences	P	2015-11-17	2016-12-22
300 Shs IShares NASDAQ	P	2015-04-27	2016-12-23
200 Shs Novo-Nordisk	P	2015-11-17	2016-12-22
1350 Shs SPDR S & P Biotech ETF	P	2015-04-09	2016-12-23
98 Shs California Resources	P	2006-10-11	2016-05-11
1500 Shs Deere & Co	P	2000-01-01	2016-05-11

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
58,424		67,653	-9,229
27,062		26,255	807
35,736		54,097	-18,361
21,274		18,266	3,008
14,606		20,859	-6,253
76,640		101,085	-24,445
7,147		10,817	-3,670
78,339		97,397	-19,058
157		75	82
126,693		117,725	8,968

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-9,229
			807
			-18,361
			3,008
			-6,253
			-24,445
			-3,670
			-19,058
			82
			8,968

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d			
List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
300 Shs Fiserv	P	2000-12-04	2016-03-23
500 Shs Glacier Bancorp Inc	P	2012-10-19	2016-03-23
100 Shs Johnson & Johnson	P	1992-10-22	2016-06-28
100 Shs Merck & Co Inc	P	2004-03-23	2016-06-28
2300 Shs PRA Group	P	2012-03-30	2016-03-23
1500 Shs Royal Dutch Shell	P	2000-01-01	2016-02-04
2000 Shs Safeguard Scientific	P	2011-07-07	2016-12-22
200 Shs Stryker Corp	P	2009-05-12	2016-03-23
Capital Gain Distribution	P	2000-01-01	2016-12-31

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
30,108		5,440	24,668
12,638		7,446	5,192
11,741		1,250	10,491
5,536		4,409	1,127
65,259		55,053	10,206
66,783		78,664	-11,881
24,551		37,585	-13,034
21,089		8,006	13,083
15,109			15,109

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			24,668
			5,192
			10,491
			1,127
			10,206
			-11,881
			-13,034
			13,083
			15,109

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
ERIC H STRAND	Trustee 0 00	0		
PO BOX 1031 MARION, MA 02738				
Michelle ADESSO	Trustee 0 00	0		
798 DIVISION STREET S DARTMOUTH, MA 02748				
DENNIS VAN SLOUN	Trustee 0 00	0		
17230 CLEAR SPRING LANE MINNETONKA, MN 55345				
JOSEPH VAN SLOUN	Executive Direc 10 00	30,000		
3527 JIDANA LANE MINNETONKA, MN 55345				
DAVID B TITUS	Trustee 0 00	0		
PO Box 1219 MARION, MA 02738				
EVERETT M DAVIS	Trustee 0 00	0		
1961 White Feather Lane Nokomis, FL 34275				
NANCY VAN SLOUN	Trustee 0 00	0		
30 WEST POINT DRIVE TONKA BAY, MN 55331				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Nefeli Neamonitaki 3825 Pascolo Bend Chaska, MN 55318	NONE	I	Scholarship	1,000
Courtnei Carter 342 Old Westport Road N Dartmouth, MA 02747	NONE	I	Scholarship	1,000
Connecticut College 270 Mohegan Ave New London, CT 06320	NONE	PRVT	Ann C Wheeler Endowment	1,000
Hannah Rogers 1801 Milk Street Dighton, MA 02715	NONE	I	Scholarship	1,000
Nicholas Anderson 8 Field Stone Drive Westport, MA 02790	NONE	I	Scholarship	1,000
Westport Fishermen's Association PO Box 83 Westport Point, MA 02791	NONE	PRVT	UNRESTRICTED	1,000
DUCKS UNLIMITED One Waterfowl Way Memphis, TN 38120	NONE	Public	UNRESTRICTED	15,000
MORRIS ANIMAL FOUNDATION 10200 East Girard Suite B 430 Denver, CO 80231	NONE	Public	UNRESTRICTED	20,000
MONTANA STATE UNIVERSITY FND PO Box 173150 Bozeman, MT 59717	NONE	PRVT	Horticultural Department	4,000
BEREA COLLEGE 101 Chestnut Street Berea, KY 40403	NONE	PRVT	UNRESTRICTED	10,000
Westport River Watershed Alliance 1151 Main Road Westport, MA 02790	NONE	Public	UNRESTRICTED	10,000
FRONTIER NURSING 195 School Street Hyden, KY 41749	NONE	PRVT	UNRESTRICTED	11,000
Minnesota State Horticultural Society 2705 Lincoln Dr Roseville, MN 55113	NONE	Public	UNRESTRICTED	1,200
NEADS 305 Redemption Rock Trail Princeton, MA 01541	NONE	Public	UNRESTRICTED	5,000
FRIENDS ACADEMY 1088 Tucker Road North Dartmouth, MA 02747	NONE	Public	Girls Sports Programand Literacy Development, \$7,000 each	14,000
Total ►				432,000
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Perkins School for the Blind 175 N Beacon St Watertown, MA 02472	NONE	Public	UNRESTRICTED	10,000
Alice Lloyd College 100 Purpose Road Pippa Passes, KY 41844	NONE	PRVT	UNRESTRICTED	30,000
Fred Hutchinson Cancer Research Cen 1100 Fairview Ave N Seattle, WA 98109	NONE	Public	UNRESTRICTED	20,000
Demarest Lloyd Center 430 Potomska Road Dartmouth, MA 02748	NONE	Public	UNRESTRICTED	5,000
Student Conservation Association 689 River Road Charlestown, NH 03603	NONE	Public	UNRESTRICTED	10,000
BOWDOIN COLLEGE 5000 South St Brunswick, ME 04011	NONE	PRVT	UNRESTRICTED	2,000
TABOR ACADEMY Front Street Marion, MA 02738	NONE	PRVT	UNRESTRICTED	1,500
Westport Land Conservation Trust PO Box 3975 830 Drift Rd Westport, MA 02790	NONE	Public	UNRESTRICTED	1,000
Animal Rescue League of Greater Fal 474 Durfee Street Fall River, MA 02720	NONE	Public	UNRESTRICTED	70,000
Trustees University of Pennsylvania 3451 Walnut Street Philadelphia, PA 19104	NONE	Public	UNRESTRICTED	28,000
Cummings School of VetMedicin 200 Westboro Road North Grafton, MA 01536	NONE	Public	Unrestricted	10,000
The Raptor Center 1920 Fitch Avenue St Paul, MN 55108	None	Public	Unrestricted	10,000
Minnesota Landscape Arboretum Found 3675 Arboretum Drive Chaska, MN 55318	None	Public	Unrestricted	13,000
Pamela Katten Foundation 525 W Monroe Chicago, IL 60661	None	PRVT	Unrestricted	500
Vested Interest in K-9's PO Box 9 East Taunton, MA 02718	None	Public	Purchase bullet proof vest for police dog	1,100
Total ► 3a				432,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Massachusetts Audubon Society 208 S Great Road Lincoln, MA 01773	None	Public	Unrestricted	10,000
REDWOOD CITY HERITAGE ASSOCIATION 627 Hamilton Street Redwood City, CA 94063	None	Public	Unrestricted	1,000
Star Kids of New Bedford PO Box 79198 Dartmouth, MA 02747	None	Public	Unrestricted	6,900
Univ of Minnesota Masonic Cancer Ct 425 E River Pkwy Minneapolis, MN 55455	None	Public	Unrestricted	11,000
BLITHEWOLD INC 101 Ferry Road Bristol, RI 02809	None	Public	Unrestricted	10,000
Bentley University 175 Forest Street Waltham, MA 02452	None	PRVT	Unrestricted	1,000
Guiding Eyes for the Blind 611 Granite Springs Road Yorktown Heights, NY 10598	None	Public	Unrestricted	5,000
Benjamin Sosin 16559 Creekside Lane Minnetonka, MN 55345	None	I	Scholarship	1,000
Camp Sunshine 35 Acadia Road Casco, ME 04015	None	Public	Unrestricted	9,000
The Shwartz Center for Children 1 Posa Place Dartmouth, MA 02747	None	Public	Unrestricted	5,000
New England Aquarium 1 Central Wharf Boston, MA 02110	None	PC	Unrestricted	10,000
America's Vet Dogs 371 East Jericho Turnpike Smithtown, NY 11787	None	Public	Unrestricted	21,000
Katherine Cummings 121 County Road EFreetown, MA 02176	None	PRVT	Scholarship	1,000
University of Minnesota Foundation 1365 Gortner Avenue St Paul, MN 55108	None	Public	Scholarship	7,000
CLEAR 19223 Prairie Street Northridge, CA 91324	None	Public	Unrestricted	3,000
Total ► 3a				432,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Horticultural Reseach Institute 1200 G Street NW Suite 800 Washington, DC 20005	None	Public	Unrestricted	1,000
Forever Paws Animal Shelter 300 Lynnwood St Fall River, MA 02721	None	PC	Unrestricted	500
Dana Hall School 45 Dana Road Wellesley, MA 02482	None	PC	Unrestricted	750
Choate Rosemary Hall 333 Christian Street Wallingford, CT 06492	None	PC	Annual fund	1,000
Marion Art Center 80 Pleasant Street Marion, MA 02738	None	PC	Unrestricted	4,000
Minnesota Land Trust 2356 University Ave W Suite 240 St Paul, MN 55114	None	PC	Unrestricted	1,000
Yankee Golden Retriever Rescue PO Box 808 Hudson, MA 01749	None	PC	Unrestricted	2,000
The Smile Train PO Box 96231 Washington, DC 20090	None	PC	Unrestricted	500
Hmong American Farmers Association 941 Lafond Avenue West Suite 100 Saint Paul, MN 55104	None	PC	Unrestricted	500
MN Adult Teen Challenge 1619 Portland Ave S Minneapolis, MN 55404	None	PC	Unrestricted	500
Southcoast Health 43 High Street Wareham, MA 02571	None	PC	Tobey Hospital Annual Fund	2,000
Town of Fairhaven Animal Shelter 200 Bridge Street Fairhaven, MA 02719	None	PC	Unrestricted	500
Save the Children 501 Kings Hwy E - Suite 400 Fairfield, CT 06825	None	PC	Unrestricted	650
Community Nurse Home Care 62 Center Street Fairhaven, MA 02719	None	PC	Unrestricted	100
EducateMe Inc 1613 E Street SE Washington, DC 20003	None	PC	Unrestricted	1,500
Total ► 3a				432,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Bristol County Sheriff's Office 400 Faunce Corner N Dartmouth, MA 02747	None	PC	K-9 Unit	1,000
Chaska Historical Society 112 W 4th St Chaska, MN 55318	None	PC	Unrestricted	300
City of Fall River 685 Pleasant Street Fall River, MA 02721	None	PC	Unrestricted	1,000
Town of Westport Animal Control Off 816 Main Street Westport, MA 02790	None	GOV	Animal Control Fund	1,000
Abbott Northwestern Hospital 800 E 28th St Mineapolis, MN 55407	None	PC	Unrestricted	1,000
Missions Inc Home Free Shelter 3409 E Medicine Lake Blvd Minneapolis, MN 55441	None	PC	To benefit the home free shelter	1,000
Total 				432,000
3a				

TY 2016 Accounting Fees Schedule**Name:** Van Sloun Foundation**EIN:** 04-6691809**Software ID:** 16000303**Software Version:** 2016v3.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Benoit & McArdle	2,875	2,875	2,875	0

TY 2016 Investments Corporate Stock Schedule**Name:** Van Sloun Foundation**EIN:** 04-6691809**Software ID:** 16000303**Software Version:** 2016v3.0

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ANALOG DEVICES	152,502	152,502
JOHNSON & JOHNSON	103,689	103,689
MERCK	52,983	52,983
FISERV	286,956	286,956
PROCTER & GAMBLE	92,488	92,488
DOVER	127,381	127,381
US Bancorp Pfd	56,580	56,580
PEPSICO	198,797	198,797
Wells Fargo Pfd	105,720	105,720
Weyerhaeuser Co	135,405	135,405
Thermo Fisher Scientific Inc	56,440	56,440
Church & Dwight	203,274	203,274
Transcanada	158,025	158,025
NOVARTIS AG SPONSORED ADR	101,976	101,976
EXXON MOBIL	153,442	153,442
Adobe Systems	144,130	144,130
Glacier Bancorp	271,725	271,725
John Wiley Class A	125,350	125,350
Chevron Texaco	164,780	164,780
Illinois Toolworks	244,920	244,920
Occidental Pete	74,792	74,792
WATERS CORPORATION	174,707	174,707
J G BOSWELL	142,875	142,875
REALTY INCOME CORP.	149,448	149,448
KEWEENAU LAND ASSN LTD	59,100	59,100
Stryker Corp	119,810	119,810
Altria Group Inc	135,240	135,240
Paypal Holdings Inc	78,940	78,940
Goldman Sachs	101,720	101,720
Philip Morris International	82,341	82,341

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Keycorp Inc	50,980	50,980
Imperial Oil	139,040	139,040
Safeguard Scientifics	53,800	53,800
Nestle S A ADR	107,610	107,610
Private Bancorp	108,876	108,876
Royal Dutch Shell		
Deere and Company		
E I du Pont de Nemours	183,500	183,500
Portfolio Recovery Associates		
The Charles Schwab Corp	276,290	276,290
Dodge & Cox Income Fund	780,826	780,826
Apple Computer Inc	115,820	115,820
Vornado Realty Pfd	50,340	50,340
Walthausen Small Cap	98,517	98,517
Vanguard St Investment Grade Admiral	1,336,046	1,336,046
Cohen & Steers Pref Securities Income	793,212	793,212
Biogen Idec Inc	99,253	99,253
Celgene Corp	115,750	115,750
Gilead Sciences Inc		
Nasdaq Biotechnology ETF		
Novo-Nordisk		
S & P Biotech ETF		
Allied World Assurance Co	161,130	161,130
McCormick & Co	93,330	93,330
Paychex Inc	182,640	182,640
PNC Small Cap Fund	108,397	108,397

TY 2016 Other Expenses Schedule**Name:** Van Sloun Foundation**EIN:** 04-6691809**Software ID:** 16000303**Software Version:** 2016v3.0**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ADR fees	41	41	41	
Insurance	750			

TY 2016 Other Increases Schedule**Name:** Van Sloun Foundation**EIN:** 04-6691809**Software ID:** 16000303**Software Version:** 2016v3.0**Description****Amount**

Unrealized Gains and Losses Net

649,956

TY 2016 Other Professional Fees Schedule**Name:** Van Sloun Foundation**EIN:** 04-6691809**Software ID:** 16000303**Software Version:** 2016v3.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
American Research & Management	45,030	45,030	45,030	0

TY 2016 Taxes Schedule**Name:** Van Sloun Foundation**EIN:** 04-6691809**Software ID:** 16000303**Software Version:** 2016v3.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Commonwealth of Massachusetts	70			70
Federal excise taxes	1,918			
Foreign taxes	2,384	2,384	2,384	

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at <u>www.irs.gov/form990</u>.	OMB No 1545-0047 2016
	Name of the organization Van Sloun Foundation	Employer identification number 04-6691809

Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

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

General Rule

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

Special Rules

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

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

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

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

Name of organization Van Sloun Foundation	Employer identification number 04-6691809
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Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Neil Van Sloun PO Box 116 Westport Pt, MA02791	\$ 500,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
2	Sylvia M Van Sloun PO Box 116 Westport Pt, MA02791	\$ 500,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization Van Sloun Foundation	Employer identification number 04-6691809
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Part II Noncash Property			
(a) No. from Part I	(b) Description of noncash property given (see instructions) Use duplicate copies of Part II if additional space is needed	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

Name of organization

Van Sloun Foundation

Employer identification number

04-6691809

Part III	Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$ _____ Use duplicate copies of Part III if additional space is needed
-----------------	--

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	