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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.

2016

Open to Public Inspection

For calendar year **2016** or tax year beginning , and ending

Name of foundation WILSON CARUSO CHARITABLE FOUNDATION		A Employer identification number 04-6861522
Number and street (or P O box number if mail is not delivered to street address) 315 CLAPBOARDTREE STREET		B Telephone number 617-942-4259
City or town, state or province, country, and ZIP or foreign postal code WESTWOOD, MA 02090		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 type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input checked="" 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) \$ 1,617,483.	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B) check here <input type="checkbox"/>

Part I 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					
2 Check <input checked="" 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		31,195.	31,195.	31,195.	STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		20,633.			
b Gross sales price for all assets on line 6a		1,081,739.			
7 Capital gain net income (from Part IV, line 2)			20,633.		
8 Net short-term capital gain				N/A	
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11		51,828.	51,828.	31,195.	
13 Compensation of officers, directors, trustees, etc		0.	0.	0.	0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees STMT 2		2,664.	0.	0.	0.
b Accounting fees					
c Other professional fees STMT 3		6,677.	0.	0.	0.
17 Interest					
18 Taxes STMT 4		3,857.	0.	0.	0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses					
24 Total operating and administrative expenses. Add lines 13 through 23		13,198.	0.	0.	0.
25 Contributions, gifts, grants paid		86,500.			86,500.
26 Total expenses and disbursements. Add lines 24 and 25		99,698.	0.	0.	86,500.
27 Subtract line 26 from line 12		<47,870.>			
a Excess of revenue over expenses and disbursements					
b Net investment income (if negative, enter -0-)			51,828.		
c Adjusted net income (if negative, enter -0-)				31,195.	

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Part II Balance Sheets		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
Assets	1 Cash - non-interest-bearing	2,104.	155,913.	155,913.
	2 Savings and temporary cash investments			
	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 STMT 5	1,911,558.	1,709,817.	1,461,570.
	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)				
16 Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)	1,913,662.	1,865,730.	1,617,483.	
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			
	22 Other liabilities (describe)			
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	1,480,101.	1,480,101.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
29 Retained earnings, accumulated income, endowment, or other funds	433,561.	385,629.		
30 Total net assets or fund balances	1,913,662.	1,865,730.		
31 Total liabilities and net assets/fund balances	1,913,662.	1,865,730.		

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	1,913,662.
2 Enter amount from Part I, line 27a	2	<47,870.>
3 Other increases not included in line 2 (itemize)	3	0.
4 Add lines 1, 2, and 3	4	1,865,792.
5 Decreases not included in line 2 (itemize) PRIOR YEAR ADJUSTMENT	5	62.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,865,730.

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			
b	SEE ATTACHED STATEMENTS		
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e	1,081,739.	1,061,106.	20,633.

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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			
b			
c			
d			
e			20,633.

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	20,633.
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		212,994.

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?

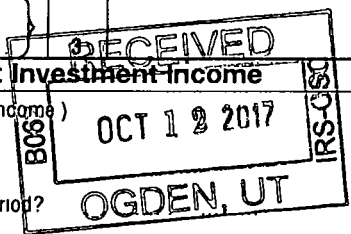
If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part

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	90,000.	1,589,830.	.056610
2014	96,500.	1,833,853.	.052621
2013	84,500.	1,605,201.	.052641
2012	77,500.	1,488,312.	.052072
2011	74,000.	1,492,531.	.049580

2	Total of line 1, column (d)	2	.263524
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	.052705
4	Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	1,471,599.
5	Multiply line 4 by line 3	5	77,561.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	518.
7	Add lines 5 and 6	7	78,079.
8	Enter qualifying distributions from Part XII, line 4	8	86,500.

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



Yes No

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	518.
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	518.
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	518.
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	2,600.
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	2,600.
8	Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	2,082.
11	Enter the amount of line 10 to be Credited to 2017 estimated tax <input type="checkbox"/> Refunded <input checked="" type="checkbox"/>	11	0.

Part VII-A Statements Regarding Activities

	Yes	No
1a		X
1b		X
1c		X
2		X
3		X
4a		X
4b		
5		X
6	X	
7	X	
8a		
8b	X	
9		X
10		X

N/A

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)
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)
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A
14 The books are in care of R&J CARUSO Telephone no 617-942-4259 Located at 315 CLAPBOARDTREE STREET, WESTWOOD, MA ZIP+4 02090
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

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)
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?
(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)?
(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)
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
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?
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
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)
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?
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.)
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?
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?

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

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). N/A

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.

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

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
RICHARD P. CARUSO 315 CLAPBOARDTREE STREET WESTWOOD, MA 02090	TRUSTEE 0.50	0.	0.	0.
JUDITH W. CARUSO 315 CLAPBOARDTREE STREET WESTWOOD, MA 02090	TRUSTEE 0.50	0.	0.	0.

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."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
		0

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 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

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.

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	1,264,040.
b	Average of monthly cash balances	1b	55,415.
c	Fair market value of all other assets	1c	174,554.
d	Total (add lines 1a, b, and c)	1d	1,494,009.
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	1,494,009.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	22,410.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,471,599.
6	Minimum investment return. Enter 5% of line 5	6	73,580.

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	73,580.
2a	Tax on investment income for 2016 from Part VI, line 5	2a	518.
b	Income tax for 2016 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	518.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	73,062.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	73,062.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	73,062.

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	86,500.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	86,500.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	518.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	85,982.

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				73,062.
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	4,996.			
b From 2012	7,196.			
c From 2013	8,522.			
d From 2014	7,895.			
e From 2015	13,021.			
f Total of lines 3a through e	41,630.			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$	86,500.			
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				73,062.
e Remaining amount distributed out of corpus	13,438.			
5 Excess distributions carryover applied to 2016 (if an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	55,068.			
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	4,996.			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	50,072.			
10 Analysis of line 9				
a Excess from 2012	7,196.			
b Excess from 2013	8,522.			
c Excess from 2014	7,895.			
d Excess from 2015	13,021.			
e Excess from 2016	13,438.			

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(j)(3) or 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2016	(b) 2015	(c) 2014	(d) 2013	
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					
3 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 foundation 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))

SEE STATEMENT 6

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.
- b The form in which applications should be submitted and information and materials they should include
- c Any submission deadlines
- d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
FISHER HOUSE 1401 ROCKVILLE PIKE SUITE 600 ROCKVILLE, MD 20852		QUALIFIED CHARITY	GENERAL CHARITABLE DONATION	5,000.
HALE RESERVATION PO BOX 310 WESTWOOD, MA 02090		QUALIFIED CHARITY	GENERAL CHARITABLE DONATION	5,000.
MASS GENERAL HOSPITAL RESEARCH FUND 100 CHARLES RIVER PLAZA BOSTON, MA 02114		QUALIFIED CHARITY	GENERAL CHARITABLE DONATION	15,000.
NEADS PO BOX 1100 PRINCETON, MA 01583		QUALIFIED CHARITY	GENERAL CHARITABLE DONATION	2,500.
NEWTON WELLESLEY HOSPITAL CHARITABLE FUND 2014 WASHINGTON STREET NEWTON, MA 02462		QUALIFIED CHARITY	GENERAL CHARITABLE DONATION	10,000.
Total			SEE CONTINUATION SHEET(S) ▶ 3a	86,500.
b Approved for future payment				
NONE				
Total				▶ 3b 0.

RICHARD P CARUSO TTEE

Account Number: 818-99673

24-Hour Assistance: (800) MERRILL

YOUR CMA FOR TRUST ASSETS

December 01, 2016 - December 30, 2016

Description	Quantity	Total Cost Basis	Estimated Market Price	Estimated Market Value	Estimated Annual Income	Est. Annual Yield%
CASH/MONEY ACCOUNTS						
CASH	240.89	240.89		240.89		
+ML BANK DEPOSIT PROGRAM	155,672.00	155,672.00	1.0000	155,672.00	31	02
+FDIC INSURED NOT SIPC COVERED						
TOTAL		155,912.89		155,912.89	31	02

Equities Description	Symbol	Acquired	Quantity	Unit Cost Basis	Total Cost Basis	Estimated Market Price	Estimated Market Value	Unrealized Gain/(Loss)	Annual Income	Estimated Current Yield%
CHESAPEAKE ENERGY OKLA	CHK	08/30/16	20,000	6.5360	130,720.34	7.0200	140,400.00	9,679.66		
DEVON ENERGY CORP NEW	DVN	08/19/14	2,000	74.5287	149,057.59	45.6700	91,340.00	(57,717.59)	480	52
		09/17/14	2,000	73.4747	146,949.51	45.6700	91,340.00	(55,609.51)	480	52
Subtotal			4,000		296,007.10		182,680.00	(113,327.10)	960	52
DIGIMARC CORP	DMRC	06/30/15	3,000	44.8876	134,662.97	30.0000	90,000.00	(44,662.97)		
		03/24/16	2,000	31.3630	62,726.00	30.0000	60,000.00	(2,726.00)		
Subtotal			5,000		197,388.97		150,000.00	(47,388.97)		
DU PONT E I DE NEMOURS	DD	08/29/16	1,000	70.3750	70,375.00	73.4000	73,400.00	3,025.00	1,520	2.07
		08/31/16	1,000	69.9500	69,950.00	73.4000	73,400.00	3,450.00	1,520	2.07
Subtotal			2,000		140,325.00		146,800.00	6,475.00	3,040	2.07
FORD MOTOR CO	F	05/18/16	5,000	13.1576	65,788.00	12.1300	60,650.00	(5,138.00)	3,000	4.94
IAC INTERACTIVE CORP	IAC	09/03/14	2,000	70.7644	141,528.80	64.7900	129,580.00	(11,948.80)	2,721	2.09
		06/22/16	1,000	56.2523	56,252.30	64.7900	64,790.00	8,537.70	1,361	2.09
Subtotal			3,000		197,781.10		194,370.00	(3,411.10)	4,082	2.09
NAM TAI PROPERTY INC	NTP	09/04/13	5,000	7.9354	39,677.15	7.4000	37,000.00	(2,677.15)	1,401	3.78
		09/10/13	5,000	8.2778	41,389.00	7.4000	37,000.00	(4,389.00)	1,401	3.78
		04/08/14	10,000	7.0188	70,188.67	7.4000	74,000.00	3,811.33	2,801	3.78
		09/17/15	10,000	5.9605	59,605.62	7.4000	74,000.00	14,394.38	2,801	3.78
Subtotal			30,000		210,860.44		222,000.00	11,139.56	8,404	3.78

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RICHARD P CARUSO TTEE

Account Number: 818-99673

YOUR CMA FOR TRUST ASSETS

December 01, 2016- December 30, 2016

EQUITIES (continued) Description	Symbol	Acquired	Quantity	Unit Cost Basis	Total Cost Basis	Estimated Market Price	Estimated Market Value	Unrealized Gain/(Loss)	Annual Income	Estimated Current Yield%
SUPERVALU INC DEL COM	SVU	04/04/14	10,000	7.1578	71,578.07	4.6700	46,700.00	(24,878.07)		
		05/06/14	10,000	7.0599	70,599.50	4.6700	46,700.00	(23,899.50)		
		05/12/14	5,000	7.2898	36,449.00	4.6700	23,350.00	(13,099.00)		
		08/03/16	10,000	4.7893	47,893.00	4.6700	46,700.00	(1,193.00)		
		08/10/16	5,000	4.8598	24,299.00	4.6700	23,350.00	(949.00)		
		10/17/16	10,000	5.3794	53,794.25	4.6700	46,700.00	(7,094.25)		
<i>Subtotal</i>			50,000		304,612.82		233,500.00	(71,112.82)		
TOTAL					1,543,483.77		1,330,400.00	(213,083.77)	19,486	1.46

MUTUAL FUNDS/CLOSED END FUNDS/UIT

Description	Quantity	Total Cost Basis	Estimated Market Price	Estimated Market Value	Unrealized Gain/(Loss)	Total Client Investment	Cumulative Investment Return (\$)	Estimated Annual Current Income	Current Yield%
CALAMOS CONV OPP INC FD	13,000	166,333.73	10.0900	131,170.00	(35,163.73)	166,333	(35,163)	14,820	11.29
SYMBOL CHI Fixed Income 59% Equity 41%									
				77,390.30					
				53,779.70					
TOTAL		166,333.73		131,170.00	(35,163.73)		(35,163)	14,820	11.30

LONG PORTFOLIO

Adjusted/Total Cost Basis	Estimated Market Value	Unrealized Gain/(Loss)	Estimated Annual Interest	Estimated Annual Income	Current Yield%
1.865,730.39	1,617,482.89	(248,247.50)		34,337	2.12
TOTAL					

Total Client Investment: Cost of shares directly purchased and still held. Does not include shares purchased through reinvestment.
Cumulative Investment Return: Estimated Market Value minus Total Client Investment. Cumulative Investment Return is the dollar value of the capital appreciation (depreciation) of all shares purchased and still held, including shares acquired through reinvestment of dividends and distributions, which may be greater or less than the actual income distributed.

Unrealized Gain or (Loss): Estimated Market Value minus Total Cost Basis (total cost of shares directly purchased and still held, as well as cost of shares acquired through reinvestment). Provided for Tax Planning purposes only and is not applicable to retirement accounts.
Initial Purchase: Date of your initial investment in this fund.



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 ALCOA INC	P	04/20/16	10/24/16
b 3,333 SHRS ARCONIC INC	P	04/20/16	11/21/16
c 1,110.9989 SHRS ALCOA CORP	P	04/20/16	11/07/16
d 1,000 SHRS DELTA AIR LINES	P	10/21/15	03/02/16
e 2,000 SHRS DELTA AIR LINES	P	10/26/15	09/29/16
f 5,000 SHRS US STL CORP	P	09/23/15	03/07/16
g 5,000 SHRS US STL CORP	P	11/02/15	04/20/16
h 2,000 SHRS US STL CORP	P	11/02/15	06/22/16
i 3,000 SHRS US STL CORP	P	11/02/15	08/03/16
j 5,000 SHRS US STL CORP	P	03/02/16	08/15/16
k 5,000 SHRS US STL CORP	P	03/02/16	11/15/16
l 2,000 SHRS DEVON ENERGY CORP	P	08/19/14	08/31/16
m 1,000 SHRS DEVON ENERGY CORP	P	08/19/14	10/17/16
n 15,000 SHRS FX ENERGY INC	P	06/15/12	01/27/16
o 2,000 SHRS CALAMOS MCONV OPP	P	02/10/12	08/30/16

(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 9.		11.	<2.>
b 66,159.		77,718.	<11,559.>
c 29,008.		28,372.	636.
d 47,996.		50,230.	<2,234.>
e 79,348.		102,379.	<23,031.>
f 68,749.		57,800.	10,949.
g 100,177.		61,000.	39,177.
h 34,080.		25,138.	8,942.
i 77,282.		37,707.	39,575.
j 112,178.		49,642.	62,536.
k 137,647.		49,642.	88,005.
l 87,878.		87,878.	0.
m 42,203.		74,529.	<32,326.>
n 17,250.		81,662.	<64,412.>
o 21,255.		23,679.	<2,424.>

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			** <2.>
b			** <11,559.>
c			** 636.
d			** <2,234.>
e			** <23,031.>
f			** 10,949.
g			** 39,177.
h			** 8,942.
i			** 39,575.
j			** 62,536.
k			** 88,005.
l			** 0.
m			** <32,326.>
n			** <64,412.>
o			** <2,424.>

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

WILSON CARUSO CHARITABLE FOUNDATION

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	5,000 SHRS GENERAL CABLE CORP	P	06/27/14	05/03/16
b	2,000 SHRS CHINERA INVT CORP	P	09/23/10	03/03/16
c	5,000 SHRS CALAMOS CONV OPP	P	11/10/03	08/30/16
d				
e				
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

	(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	80,519.		119,849.	<39,330.>
b	26,863.		36,974.	<10,111.>
c	53,138.		96,896.	<43,758.>
d				
e				
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
(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			<39,330.>
b			<10,111.>
c			<43,758.>
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

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	20,633.
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	212,994.

823591
04-01-16

** (SHORT-TERM)

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
OUTWARD BOUND - THOMPSON ISLAND PO BOX 127 BOSTON, MA 02127		QUALIFIED CHARITY	GENERAL CHARITABLE DONATION	25,000.
RIVERSIDE INDUSTRIES ONE COTTAGE STREET EASTHAMPTON, MA 01027		QUALIFIED CHARITY	GENERAL CHARITABLE DONATION	5,000.
SCHEPENS EYE RESEARCH INSTITUTE 243 CHARLES STREET BOSTON, MA 02114		QUALIFIED CHARITY	GENERAL CHARITABLE DONATION	5,000.
SPAULDING REHABILITATION HOSPITAL 1575 CAMBRIDGE STREET BOSTON, MA 02138		QUALIFIED CHARITY	GENERAL CHARITABLE DONATION	5,000.
TRUSTEES OF RESERVATIONS 127 ESSEX STREET BEVERLY, MA 01915		QUALIFIED CHARITY	GENERAL CHARITABLE DONATION	5,000.
WESTWOOD COUNCIL ON AGING 210 NAHATAN STREET WESTWOOD, MA 02090		QUALIFIED CHARITY	GENERAL CHARITABLE DONATION	2,000.
WESTWOOD FOOD BANK 210 NAHATAN STREET WESTWOOD, MA 02090		QUALIFIED CHARITY	GENERAL CHARITABLE DONATION	1,000.
WESTWOOD LAND TRUST PO BOX 2616 WESTWOOD, MA 02090		QUALIFIED CHARITY	GENERAL CHARITABLE DONATION	1,000.
Total from continuation sheets				49,000.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
MERRILL LYNCH	20,216.	0.	20,216.	20,216.	20,216.
MERRILL LYNCH	10,969.	0.	10,969.	10,969.	10,969.
MERRILL LYNCH	10.	0.	10.	10.	10.
TO PART I, LINE 4	31,195.	0.	31,195.	31,195.	31,195.

FORM 990-PF LEGAL FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BURNS & LEVINSON LLP	2,664.	0.	0.	0.
TO FM 990-PF, PG 1, LN 16A	2,664.	0.	0.	0.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	6,677.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 16C	6,677.	0.	0.	0.

FORM 990-PF TAXES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
US TREASURY	3,822.	0.	0.	0.
COMMONWEALTH OF MASSACHUSETTS	35.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 18	3,857.	0.	0.	0.

FORM 990-PF CORPORATE STOCK STATEMENT 5

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED SHEET	1,709,817.	1,461,570.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,709,817.	1,461,570.

FORM 990-PF PART XV - LINE 1A LIST OF FOUNDATION MANAGERS STATEMENT 6

NAME OF MANAGER

RICHARD P. CARUSO
 JUDITH W. CARUSO