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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	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1	Cash—non-interest-bearing		34,419	17,638	17,638
	2	Savings and temporary cash investments		18,738	46,482	46,482
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____				
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)				
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments—U S and state government obligations (attach schedule)				
	b	Investments—corporate stock (attach schedule)	2,546,334	3,082,008	3,565,924	
	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)	633,937	506,062	496,488	
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____				
15	Other assets (describe ▶ _____)	0	2,856	0		
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	3,233,428	3,655,046	4,126,532		
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe ▶ _____)				
	23	Total liabilities (add lines 17 through 22)	0	0		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ☐ and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ☒ and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds	0	0		
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0		
	29	Retained earnings, accumulated income, endowment, or other funds	3,233,428	3,655,046		
30	Total net assets or fund balances (see instructions)	3,233,428	3,655,046			
31	Total liabilities and net assets/fund balances (see instructions) .	3,233,428	3,655,046			

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	3,233,428
2	Enter amount from Part I, line 27a	2	560,121
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	3,793,549
5	Decreases not included in line 2 (itemize) ▶ _____	5	138,503
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	3,655,046

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)
1 a MORGAN STANLEY - ST COVERED		2016-04-27	2016-12-31
b MORGAN STANLEY - LT COVERED		2012-05-17	2016-12-31
c MORGAN STANLEY - LT NON-COVERED		2011-06-29	2016-12-31
d CAPITAL GAINS DIVIDENDS	P		
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 54,822		53,419	1,403
b 996,245		869,344	126,901
c 305,585		177,250	128,335
d 430			430
e			

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))
(j) F M V as of 12/31/69	(k) Adjusted basis as of 12/31/69	(l) Excess of col (j) over col (k), if any	
a			1,403
b			126,901
c			128,335
d			430
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	257,069
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	1,403

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	234,073	3,416,185	0 068519
2014	194,625	3,173,395	0 061330
2013	178,185	2,665,639	0 066845
2012	112,528	2,156,920	0 052171
2011	115,511	1,653,637	0 069853

2 Total of line 1, column (d)	2	0 318718
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 063744
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	3,654,389
5 Multiply line 4 by line 3	5	232,945
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	3,000
7 Add lines 5 and 6	7	235,945
8 Enter qualifying distributions from Part XII, line 4	8	240,236

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	3,000
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	3,000
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	3,000
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	1
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	3,500
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	3,501
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	56
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	445
11	Enter the amount of line 10 to be Credited to 2017 estimated tax ▶ 445 Refunded ▶	11	0

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ \$ 0 (2) On foundation managers ▶ \$ 0		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ 0		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	2	No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>	5	No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ MA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i> .	8b	Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	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 ► MARGARET BOASBERG Telephone no ► (617) 572-2532			

Located at **►** 199 OTIS STREET NEWTON MA ZIP+4 **►** 02465

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

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

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

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

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

5a During the year did the foundation pay or incur any amount to (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). ☐ Yes ☒ No (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No b If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? ☐ 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)	5b		
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		

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
CHRISTOPHER BIERLY 199 OTIS STREET NEWTON, MA 02465	TRUSTEE 1 00	0	0	0
MARGARET BOASBERG 199 OTIS STREET NEWTON, MA 02465	TRUSTEE 2 00	0	0	0
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	Contributions to employee benefit plans and deferred compensation (d)	Expense account, (e) other allowances
NONE				
Total number of other employees paid over \$50,000. ▶				0

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	3,688,713
b	Average of monthly cash balances.	1b	21,327
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	3,710,040
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	3,710,040
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	55,651
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	3,654,389
6	Minimum investment return. Enter 5% of line 5.	6	182,719

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	182,719
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	3,000
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	3,000
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	179,719
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	179,719
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	179,719

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	240,236
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	240,236
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	3,000
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	237,236

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				179,719
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2016				
a From 2011.				39,632
b From 2012.				5,027
c From 2013.				48,086
d From 2014.				41,308
e From 2015.				67,044
f Total of lines 3a through e.	201,097			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ 240,236				
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.				179,719
e Remaining amount distributed out of corpus	60,517			
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	261,614			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2015 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions).	39,632			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	221,982			
10 Analysis of line 9				
a Excess from 2012.				5,027
b Excess from 2013.				48,086
c Excess from 2014.				41,308
d Excess from 2015.				67,044
e Excess from 2016.				60,517

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))
See Additional Data Table

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
MARGARET BOASBERG
199 OTIS STREET
NEWTON, MA 02456
(617) 965-3626

b The form in which applications should be submitted and information and materials they should include
NOT APPLICABLE

c Any submission deadlines
NOT APPLICABLE

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors
THE FOUNDATION MAKES CHARITABLE CONTRIBUTIONS ONLY FOR CHARITABLE, EDUCATIONAL OR SCIENTIFIC PURPOSES DEFINED BY SEC 501 (C) (3) OF THE INTERNAL REVENUE CODE

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			3a	240,236
b <i>Approved for future payment</i>				
Total			3b	0

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** 328,468

(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 THOMAS ASTORE	Preparer's Signature	Date 2017-05-25	Check if self-employed ☐	PTIN P01391196
Firm's name ▶ RODMAN & RODMAN PC				Firm's EIN ▶ 04-2929802
Firm's address ▶ 51 SAWYER ROAD STE 610 WALTHAM, MA 02453				Phone no (617) 965-5959

Form 990PF Part XV Line 1a - 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).

CHRISTOPHER BIERLY
MARGARET BOASBERG

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				
A BETTER PLACE 396 WASHINGTON STREET WELLESLEY, MA 02481	NONE	PC	GENERAL DONATION	1,000
AIDS LIFECYCLE 1035 MARKET STREET SUITE 400 SAN FRANCISCO, CA 94103	NONE	PC	GENERAL DONATION	200
ARTHRITIS FOUNDATION 29 CRAFTS STREET 450 NEWTON, MA 02458	NONE	PC	GENERAL DONATION	200
AUTISM SPEAKS 85 DEVONSHIRE STREET BOSTON, MA 02109	NONE	PC	GENERAL DONATION	100
BAIN CAPITAL'S CHILDREN'S CHARITIES 111 HUNTINGTON AVENUE BOSTON, MA 02199	NONE	PC	GENERAL DONATION	15,000
BHARVARD BUSINESS SCHOOL SOLDIES FIELD BOSTON, MA 02163	NONE	PC	GENERAL DONATION	250
BOSTON MARATHON JIMMY FUND WALK 10 BROOKLINE PLACE WEST 6TH FLOOR BROOKLINE, MA 02445	NONE	PC	GENERAL DONATION	500
BOSTON MEDICAL CENTER 1 BOSTON MEDICAL CENTER PL BOSTON, MA 02118	NONE	PC	GENERAL DONATION	500
BOYS AND GIRLS CLUB OF BOSTON 200 HIGH STREET 3RD FLOOR BOSTON, MA 02110	NONE	PC	GENERAL DONATION	5,000
BUCKINGHAM BROWNE AND NICHOLS SCHOOL 80 GERRYS LANDING RD CAMBRIDGE, MA 02138	NONE	PC	GENERAL DONATION	25,000
CAMP HOLIDAY TRAILS 400 HOLIDAY TRAILS LN CHARLOTTESVILLE, VA 22903	NONE	PC	GENERAL DONATION	5,000
CHILDRENS HOSPITAL 300 LONGWOOD AVE BOSTON, MA 02115	NONE	PC	GENERAL DONATION	5,000
CHILDRENS ROOM 1210 MASSACHUSETTS AVE ARLINGTON, MA 02476	NONE	PC	GENERAL DONATION	450
COMMUNITY FOUNDATION FOR NANTUCKET 9 BAYBERRY CT NANTUCKET, MA 02554	NONE	PC	GENERAL DONATION	1,000
COURAGEOUS PARENTS NETWORK 21 ROCHESTER ROAD NEWTON, MA 02458	NONE	PC	GENERAL DONATION	500
Total ► 3a				240,236

Form 990FP 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				
CRADLES TO CRAYONS 155 N BEACON STREET BRIGHTON, MA 02135	NONE	PC	GENERAL DONATION	2,500
DIANNA FOSSEY GORILLA FUND SUITE 200 ATLANTA, GA 30315	NONE	PC	GENERAL DONATION	7,500
DOCTORS WITHOUT BORDERS 333 7TH AVENUE NEW YORK, NY 10001	NONE	PC	GENERAL DONATION	5,000
ENDEAVOR GLOBAL 900 BROADWAY NEW YORK, NY 10003	NONE	PC	GENERAL DONATION	7,500
FAMILY ACCESS OF NEWTON 492 WALTHAM ST WEST NEWTON, MA 02465	NONE	PC	GENERAL DONATION	500
FRIENDS OF THE NICU (BRIGHAM AND WOMEN'S HOSPITAL) 75 FRANCIS STREET BOSTON, MA 02115	NONE	SO II	GENERAL DONATION	10,000
GREATER BOSTON FOOD BANK 70 S BAY AVE BOSTON, MA 02118	NONE	PC	GENERAL DONATION	100
NANTUCKET COTTAGE HOSPITAL 57 PROSPECT ST UNIT 1 NANTUCKET, MA 02554	NONE	PC	GENERAL DONATION	2,500
NANTUCKET DREAMLAND FOUNDATION 17 SOUTH WATER STREET NANTUCKET, MA 02554	NONE	PC	GENERAL DONATION	16,425
NANTUCKET THEATER INSTITUTE 5 N WATER STREET NANTUCKET, MA 02554	NONE	PC	GENERAL DONATION	25,000
NATIONAL CATHEDRAL SCHOOL 3612 WOODLEY RD NW WASHINGTON DC, DC 20016	NONE	PC	GENERAL DONATION	250
NEWTON GARDEN BUDS 41 LENOX STREET NEWTON, MA 02465	NONE	PC	GENERAL DONATION	2,500
NEWTON YOUTH PLAYERS 1000 COMMONWEALTH AVE NEWTON, MA 02459	NONE	PC	GENERAL DONATION	200
NEWTON-WELLESLEY HOSPITAL CHARITABLE FOUNDATION 2014 WASHINGTON STREET NEWTON, MA 02462	NONE	PC	GENERAL DONATION	2,800
ONE ORLANDO FUND 400 S ORANGE AVE 4TH FLOOR ORLANDO, FL 32801	NONE	PC	GENERAL DONATION	5,000
Total ► 3a				240,236

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				
PAN MASS CHALLENGE 77 4TH AVE NEEDHAM, MA 02494	NONE	PC	GENERAL DONATION	250
PARK SCHOOL 171 GODDARD AVE BROOKLINE, MA 02445	NONE	PC	GENERAL DONATION	17,500
PARTNERS IN HEALTH 3RD FLOOR 888 COMMONWEALTH AVE BOSTON, MA 02215	NONE	PC	GENERAL DONATION	10,000
SAVE THE CHILDREN 501 KINGS HWY E 400 FAIRFIELD, CT 06825	NONE	PC	GENERAL DONATION	336
SCHOOL THE WORLD 376 BOYLSTON STREET 203 BOSTON, MA 02116	NONE	PC	GENERAL DONATION	75
STANFORD GSB 655 KNIGHT WAY STANFORD CALIFORNIA, CA 94305	NONE	PC	GENERAL DONATION	500
THEATER WORKSHOP OF NANTUCKET 62 CENTRE STREET NANTUCKET, MA 02554	NONE	PC	GENERAL DONATION	5,000
UNITED WAY OF MASS BAY 51 SLEEPER STREET BOSTON, MA 02210	NONE	PC	GENERAL DONATION	50,000
UNIVERSITY OF VIRGINIA - FUND FOR THE ARTS 1300 JEFFERSON PARK AVE CHARLOTTESVILLE, VA 22903	NONE	PC	GENERAL DONATION	2,500
UNIVERSITY OF VIRGINIA 1300 JEFFERSON PARK AVE CHARLOTTESVILLE, VA 22903	NONE	PC	GENERAL DONATION	5,000
WBUR 890 COMMONWEALTH AVE BOSTON, MA 02215	NONE	PC	GENERAL DONATION	1,000
YALE UNIVERSITY 206 ELM ST NEW HAVEN, CT 06520	NONE	PC	GENERAL DONATION	600
Total ►				240,236
3a				

TY 2016 Investments Corporate Stock Schedule**Name:** BIERLY BOASBERG FOUNDATION**EIN:** 04-6903459

Name of Stock	End of Year Book Value	End of Year Fair Market Value
MORGAN STANLEY - CORPORATE STOCK	3,082,008	3,565,924

TY 2016 Investments - Other Schedule

Name: BIERLY BOASBERG FOUNDATION

EIN: 04-6903459

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MORGAN STANLEY - MUTUAL FUNDS	AT COST	506,062	496,488

TY 2016 Other Assets Schedule**Name:** BIERLY BOASBERG FOUNDATION**EIN:** 04-6903459**Other Assets Schedule**

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
DIVIDEND RECEIVABLE		2,426	
CAPITAL GAINS RECEIVABLE		430	

TY 2016 Other Decreases Schedule

Name: BIERLY BOASBERG FOUNDATION
EIN: 04-6903459

Description	Amount
RECLASS BEGINNING RETAINED EARNINGS	138,503

TY 2016 Other Professional Fees Schedule**Name:** BIERLY BOASBERG FOUNDATION**EIN:** 04-6903459

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	25,723	25,723	0	0

TY 2016 Taxes Schedule**Name:** BIERLY BOASBERG FOUNDATION**EIN:** 04-6903459

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	2,653	2,653	0	0
TAXES PAID-MA	125	125	0	0

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990	OMB No 1545-0047 2016

Name of the organization BIERLY BOASBERG FOUNDATION	Employer identification number 04-6903459
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Organization type (check one)

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

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

General Rule

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

Special Rules

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

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

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

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

Name of organization BIERLY BOASBERG FOUNDATION	Employer identification number 04-6903459
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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
—	See Additional Data Table _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
—	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
—	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
—	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
—	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
—	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
—	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
—	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)

Name of organization BIERLY BOASBERG FOUNDATION	Employer identification number 04-6903459
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Part II Noncash Property (see Instructions) Use duplicate copies of Part II if additional space is needed			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	See Additional Data Table	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____		\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____		\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____		\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____		\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____		\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____		\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____		\$ _____	_____

Name of organization BIERLY BOASBERG FOUNDATION	Employer identification number 04-6903459
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Part III	Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$ _____ Use duplicate copies of Part III if additional space is needed
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(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	

Additional Data

Software ID:
Software Version:
EIN: 04-6903459
Name: BIERLY BOASBERG FOUNDATION

Form 990 Schedule B, 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
<u>1</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 44,983	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA02465		Noncash ☒ (Complete Part II for noncash contribution)
<u>2</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 68,569	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA02465		Noncash ☒ (Complete Part II for noncash contribution)
<u>3</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 8,080	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA02465		Noncash ☒ (Complete Part II for noncash contribution)
<u>4</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 12,936	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA02465		Noncash ☒ (Complete Part II for noncash contribution)
<u>5</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 7,660	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA02465		Noncash ☒ (Complete Part II for noncash contribution)
<u>6</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 13,076	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA02465		Noncash ☒ (Complete Part II for noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
<u>7</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 9,360	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA02465		Noncash ☒ (Complete Part II for noncash contribution)
<u>8</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 12,077	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA02465		Noncash ☒ (Complete Part II for noncash contribution)
<u>9</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 8,927	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA02465		Noncash ☒ (Complete Part II for noncash contribution)
<u>10</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 9,813	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA02465		Noncash ☒ (Complete Part II for noncash contribution)
<u>11</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 6,718	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA02465		Noncash ☒ (Complete Part II for noncash contribution)
<u>12</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 8,663	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA02465		Noncash ☒ (Complete Part II for noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
<u>13</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 1,765	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA02465		Noncash ☒ (Complete Part II for noncash contribution)
<u>14</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 47,066	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA02465		Noncash ☒ (Complete Part II for noncash contribution)
<u>15</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 41,823	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA02465		Noncash ☒ (Complete Part II for noncash contribution)
<u>16</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 14,313	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA02465		Noncash ☒ (Complete Part II for noncash contribution)
<u>17</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 10,472	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA02465		Noncash ☒ (Complete Part II for noncash contribution)
<u>18</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 2,383	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA02465		Noncash ☒ (Complete Part II for noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
19	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 19,576	Person ☒ Payroll ☐ Noncash ☒ (Complete Part II for noncash contribution)
	199 OTIS STREET		
	NEWTON, MA02465		
20	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 7,395	Person ☒ Payroll ☐ Noncash ☒ (Complete Part II for noncash contribution)
	199 OTIS STREET		
	NEWTON, MA02465		
21	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 36,722	Person ☒ Payroll ☐ Noncash ☒ (Complete Part II for noncash contribution)
	199 OTIS STREET		
	NEWTON, MA02465		
22	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 8,704	Person ☒ Payroll ☐ Noncash ☒ (Complete Part II for noncash contribution)
	199 OTIS STREET		
	NEWTON, MA02465		
23	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 10,263	Person ☒ Payroll ☐ Noncash ☒ (Complete Part II for noncash contribution)
	199 OTIS STREET		
	NEWTON, MA02465		
24	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 10,912	Person ☒ Payroll ☐ Noncash ☒ (Complete Part II for noncash contribution)
	199 OTIS STREET		
	NEWTON, MA02465		

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
<u>25</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 11,956	Person ☒ Payroll ☐ Noncash ☒ (Complete Part II for noncash contribution)
	199 OTIS STREET		
	NEWTON, MA02465		
<u>26</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 7,654	Person ☒ Payroll ☐ Noncash ☒ (Complete Part II for noncash contribution)
	199 OTIS STREET		
	NEWTON, MA02465		
<u>27</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 9,950	Person ☒ Payroll ☐ Noncash ☒ (Complete Part II for noncash contribution)
	199 OTIS STREET		
	NEWTON, MA02465		
<u>28</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 27,389	Person ☒ Payroll ☐ Noncash ☒ (Complete Part II for noncash contribution)
	199 OTIS STREET		
	NEWTON, MA02465		
<u>29</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 4,016	Person ☒ Payroll ☐ Noncash ☒ (Complete Part II for noncash contribution)
	199 OTIS STREET		
	NEWTON, MA02465		
<u>30</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 17,169	Person ☒ Payroll ☐ Noncash ☒ (Complete Part II for noncash contribution)
	199 OTIS STREET		
	NEWTON, MA02465		

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
<u>1</u>	331 ISHARES RUSSELL 2000	<u>\$ 44,983</u>	<u>2016-12-07</u>
<u>2</u>	385 ISARES RUSSELL MID-CAP	<u>\$ 68,569</u>	<u>2016-11-29</u>
<u>3</u>	135 NUCOR CORP	<u>\$ 8,080</u>	<u>2016-11-16</u>
<u>4</u>	78 GENL DYNAMICS	<u>\$ 12,936</u>	<u>2016-11-16</u>
<u>5</u>	64 CELGENE CORP	<u>\$ 7,660</u>	<u>2016-11-16</u>
<u>6</u>	204 AMER INTL GP INC NEW	<u>\$ 13,076</u>	<u>2016-11-16</u>
<u>7</u>	90 MASTERCARD INC	<u>\$ 9,360</u>	<u>2016-11-16</u>
<u>8</u>	498 AIA GROUP LTD	<u>\$ 12,077</u>	<u>2016-11-16</u>
<u>9</u>	166 METLIFE INC	<u>\$ 8,927</u>	<u>2016-11-16</u>
<u>10</u>	126 STATE STREET CORP	<u>\$ 9,813</u>	<u>2016-11-16</u>

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(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
<u>11</u>	9 AMAZON COM INC	<u>\$ 6,718</u>	<u>2016-11-16</u>
<u>12</u>	42 GOLDMAN SACHS GRP INC	<u>\$ 8,663</u>	<u>2016-11-16</u>
<u>13</u>	22 CAPITAL ONE FINANCIAL CORP	<u>\$ 1,765</u>	<u>2016-11-16</u>
<u>14</u>	267 ISHARES RUSSELL MID-CAP	<u>\$ 47,066</u>	<u>2016-08-23</u>
<u>15</u>	191 SPDR S&P 500	<u>\$ 41,823</u>	<u>2016-08-26</u>
<u>16</u>	118 JOHNSON & JOHNSON	<u>\$ 14,313</u>	<u>2016-06-30</u>
<u>17</u>	365 CISCO SYS INC	<u>\$ 10,472</u>	<u>2016-06-30</u>
<u>18</u>	34 AMERICAN ELECTRIC POWER CO	<u>\$ 2,383</u>	<u>2016-06-30</u>
<u>19</u>	1293 KDDI CORP UNSPON ADR	<u>\$ 19,576</u>	<u>2016-06-30</u>
<u>20</u>	119 JPMORGAN CHASE & CO	<u>\$ 7,395</u>	<u>2016-06-30</u>

Form 990 Schedule B, Part II - Noncash Property (see Instructions) Use duplicate copies of Part II if additional space is needed			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
<u>21</u>	1400 TAIWAN SMCNDCTR MFG CO LTD	<u>\$ 36,722</u>	<u>2016-06-30</u>
<u>22</u>	107 ENERGY CORP NEW	<u>\$ 8,704</u>	<u>2016-06-30</u>
<u>23</u>	227 PUBLIC SERVICE ENTERPRISE GP	<u>\$ 10,263</u>	<u>2016-04-22</u>
<u>24</u>	86 KIMBERLY CLARK CORP	<u>\$ 10,912</u>	<u>2016-04-22</u>
<u>25</u>	124 DANAHER CORP	<u>\$ 11,956</u>	<u>2016-04-22</u>
<u>26</u>	122 AMERICAN ELECTRIC POWER CO	<u>\$ 7,654</u>	<u>2016-04-22</u>
<u>27</u>	90 FACEBOOK INC	<u>\$ 9,950</u>	<u>2016-04-22</u>
<u>28</u>	270 CVS HEALTH CORP COM	<u>\$ 27,389</u>	<u>2016-04-22</u>
<u>29</u>	3 PRICELINE GRP INC	<u>\$ 4,016</u>	<u>2016-04-22</u>
<u>30</u>	128 UNITEDHEALTH GP INC	<u>\$ 17,169</u>	<u>2016-04-22</u>