

For calendar year 2016, or tax year beginning 01-01-2016, and ending 12-31-2016

Name of foundation THE ASHURST FOUNDATION C/O ELIZABETH K POZEN		A Employer identification number 20-6325176	
Number and street (or P O box number if mail is not delivered to street address) 9 ARLINGTON STREET		Room/suite	B Telephone number (see instructions) (617) 816-7904
City or town, state or province, country, and ZIP or foreign postal code BOSTON, MA 021163410		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 20,607,163	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	250,000			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	50	50		
	4 Dividends and interest from securities . . .	702,645	702,645		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	5,082			
	b Gross sales price for all assets on line 6a 1,455,771				
	7 Capital gain net income (from Part IV, line 2) . . .		14,470		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	9,144	9,144		
	12 Total. Add lines 1 through 11	966,921	726,309		
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	2,500	2,500		
	c Other professional fees (attach schedule)	32,941	32,941		
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	38,550	38,550		
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	250			
	24 Total operating and administrative expenses. Add lines 13 through 23	74,241	73,991		0
	25 Contributions, gifts, grants paid	966,250			966,250
	26 Total expenses and disbursements. Add lines 24 and 25	1,040,491	73,991		966,250
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-73,570			
	b Net investment income (if negative, enter -0-)		652,318		
	c Adjusted net income(if negative, enter -0-) . . .				

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					
	2	Savings and temporary cash investments	346,274	153,288	153,288		
	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)	9,950,080	11,832,767	11,832,767		
	c	Investments—corporate bonds (attach schedule)		400,000	400,000		
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
	12	Investments—mortgage loans					
	13	Investments—other (attach schedule)	8,544,417	8,221,108	8,221,108		
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
15	Other assets (describe ▶ _____)						
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	18,840,771	20,607,163	20,607,163			
Liabilities	17	Accounts payable and accrued expenses					
	18	Grants payable					
	19	Deferred revenue					
	20	Loans from officers, directors, trustees, and other disqualified persons					
	21	Mortgages and other notes payable (attach schedule)					
	22	Other liabilities (describe ▶ _____)					
	23	Total liabilities (add lines 17 through 22)		0			
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.						
	24	Unrestricted					
	25	Temporarily restricted					
	26	Permanently restricted					
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.						
	27	Capital stock, trust principal, or current funds	18,840,771	20,607,163			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund					
	29	Retained earnings, accumulated income, endowment, or other funds					
30	Total net assets or fund balances (see instructions)	18,840,771	20,607,163				
31	Total liabilities and net assets/fund balances (see instructions) .	18,840,771	20,607,163				

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	18,840,771
2	Enter amount from Part I, line 27a	2	-73,570
3	Other increases not included in line 2 (itemize) ▶ _____	3	1,839,962
4	Add lines 1, 2, and 3	4	20,607,163
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	20,607,163

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			

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

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

2 Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	2	14,470
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

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



Yes



No

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

1 Enter the appropriate amount in each column for each year, see 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	965,232	19,456,199	0 049611
2014	803,350	19,730,447	0 040716
2013	637,550	17,900,743	0 035616
2012	420,422	12,676,936	0 033164
2011	312,000	8,519,649	0 036621

2 Total of line 1, column (d)	2	0 195728
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 039146
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	20,433,883
5 Multiply line 4 by line 3	5	799,905
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	6,523
7 Add lines 5 and 6	7	806,428
8 Enter qualifying distributions from Part XII, line 4	8	966,250

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 <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	6,523
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	
3	Add lines 1 and 2.	3	6,523
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	6,523
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	7,282
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	7,282
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	759
11	Enter the amount of line 10 to be Credited to 2017 estimated tax ▶ 759 Refunded ▶	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ \$ _____ (2) On foundation managers ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	2	No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
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 ▶ THE FOUNDATION Telephone no ▶ (617) 954-5707			

Located at **▶** 9 ARLINGTON STREET BOSTON MA ZIP+4 **▶** 021163410

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here <input type="checkbox"/> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. ▶ <input type="checkbox"/>	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		
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016).	3b		
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))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions).	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	5b		
Organizations relying on a current notice regarding disaster assistance check here.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
If "Yes," attach the statement required by Regulations section 53.4945–5(d)				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	6b		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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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
ELIZABETH K POZEN	TRUSTEE	0	0	0
9 ARLINGTON STREET BOSTON, MA 021163410	000 00			
ROBERT C POZEN	TRUSTEE	0	0	0
9 ARLINGTON STREET BOSTON, MA 021163410	000 00			
DAVID E POZEN	TRUSTEE	0	0	0
305 RIVERSIDE DRIVE NEW YORK, NY 10025	000 00			
JOANNA R POZEN	TRUSTEE	0	0	0
166 PROSPECT PLACE APT 2 BROOKLYN, NY 11238	000 00			
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
NONE				
Total number of other employees paid over \$50,000.				

Part VIII

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

3

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

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

Part IX-A

Summary of Direct Charitable Activities

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

	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	19,885,067
b	Average of monthly cash balances.	1b	459,992
c	Fair market value of all other assets (see instructions).	1c	400,000
d	Total (add lines 1a, b, and c).	1d	20,745,059
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	20,745,059
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	311,176
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	20,433,883
6	Minimum investment return. Enter 5% of line 5.	6	1,021,694

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	1,021,694
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	6,523
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	6,523
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	1,015,171
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	1,015,171
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	1,015,171

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	966,250
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	966,250
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	6,523
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	959,727

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				1,015,171
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only.			965,689	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2016				
a From 2011.				
b From 2012.				
c From 2013.				
d From 2014.				
e From 2015.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ 966,250				
a Applied to 2015, but not more than line 2a			965,689	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2016 distributable amount.				561
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2015 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017				1,014,610
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions).				
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2012.				
b Excess from 2013.				
c Excess from 2014.				
d Excess from 2015.				
e Excess from 2016.				

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))

ROBERT C POZEN

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 email 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 Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> See Additional Data Table				
Total			▶ 3a	966,250
b <i>Approved for future payment</i>				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a	_____					
b	_____					
c	_____					
d	_____					
e	_____					
f	_____					
g	Fees and contracts from government agencies					
2	Membership dues and assessments. . . .					
3	Interest on savings and temporary cash investments			14	50	
4	Dividends and interest from securities. . . .			14	702,645	
5	Net rental income or (loss) from real estate					
a	Debt-financed property.					
b	Not debt-financed property.					
6	Net rental income or (loss) from personal property					
7	Other investment income.			14	9,144	
8	Gain or (loss) from sales of assets other than inventory			14	14,470	-9,388
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). .				726,309	-9,388
13	Total. Add line 12, columns (b), (d), and (e).			13		716,921

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

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 JULIAN FRIEDMAN	Preparer's Signature	Date 2017-05-09	Check if self-employed <input type="checkbox"/>	PTIN P00252746
Firm's name ▶ FRIEDMAN HURWITZ & ALIBER				Firm's EIN ▶ 04-3341506
Firm's address ▶ 100 GALEN ST STE 101 WATERTOWN, MA 024724502				Phone no (617) 267-6969

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				
350ORG 20 JAY ST SUITE 732 BROOKLYN, NY 11201		501(C)(3)	TO SUPPORT ORG'S TAX-EXEMPT PURPOSE	20,000
ADOLESCENT CONSULTATION SERVICES TO SUPPORT OR'S TAX-EXEMPT PURPOSE 189 CAMBRIDGE ST CAMBRIDGE, MA 02141		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
ALZHEIMERS ASSOCIATION 480 PLEASANT ST WATERTOWN, MA 02472		501 (C) (3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	10,000
AM ACADEMY OF ARTS & SCIENTCES 136 IRVING STREET CAMBRIDGES, MA 02138		501 (C) (3)	TO SUPPORT ORG 'S TAX-EXEPMT PURPOSE	500
ANTI-DEFAMATION LEAGUE BOSTON 40 COURT STREET BOSTON, MA 02108		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	500
ASHOKA 1700 MAIN ST ARLINGTON, VA 22209		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	500
ASSOCIATES OF PUBLIC LIBRARY 700 BOYLSTON STREET BOSTON, MA 02116		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	2,000
BOSTON ARTS ACADEMY FOUNDATION 174 IPSWICH STREET BOSTON, MA 02215		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	30,000
BOSTON BOOK FESTIVAL 32R ESSEX ST CAMBRIDGE, MA 02139		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
BOSTON FOUNDATION 75 ARLINGTON STREET BOSTON, MA 02116		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	50,000
BOSTON LYRIC OPERA 11 AVE DE LAFAYETTE BOSTON, MA 02111		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	500
BREAST CANCER ACTION 657 MISSION ST SAN FRANCISCO, CA 94105		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	500
BRIDGE OVER TROUBLE WATERS 47 WEST ST BOSTON, MA 02111		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
BRIDGEPORT TENNIS PO BOX 185574 HAMDEN, CT 06518		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
BROOKINGS INSTITUTION 1775 MASSACHUSETTS AVE WASHINGTON, DC 20036		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	150,000
Total ► 3a				966,250

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				
BROOKLYN MUSEUM 200 EASTERN PARKWAY BROOKLYN, NY 112386025		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	20,000
CAPITAL MARKETS REGULATIONS COMMITT 125 MT AUBURN STREET CAMBRIDGE, MA 02138		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	2,000
CENTER FOR INTERNATIONAL ENVIRONMEN 1350 CONNECTICUT AVENUE WASHINGTON, DC 20036		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	20,000
COMBINED JEWISH PHILANTROPIES 126 HIGH STREET BOSTON, MA 02110		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	10,000
COMMITTEE TO LIGHT COMMONWEALTH AVE 234 CLARENDON STREET BOSTON, MA 02116		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	1,000
COUNCIL ON FOREIGN RELATIONS 58 EAST 68TH ST NEW YORK, NY 10065		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
DIMOCK COMMUNITY HEALTH CENTER 55 DIMOCK STREET ROXBURY, MA 02119		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	7,500
EQUALITY MICHIGAN EDUCATION FUND 19641 WEST 7 MILE ROAD DETROIT, MI 48219		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	10,000
FACING HISTORY 16 HURD STREET BROOKLINE, MA 02445		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	500
FEATHERSTONE ARTS CENTER PO BOX 1145 OAK BLUFFS, MA 02557		501(C)(3)	TO SUPPORT ORG 'S TAX EMEMPT PURPOSE	2,500
FRIENDS OF THE PUBLIC GARDEN 87 MOUNT VERNON ST BOSTON, MA 02116		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	5,000
HABITAT FOR HUMANITY PO BOX 1093 VINEYARD HAVEN, MA 02568		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
HARVARD UNIVERSITY 124 MOUNT AUBURN STREET CAMBRIDGE, MA 02138		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	1,000
HARVARD UNIVERSITY PUBLIC HEALTH SC 124 MOUNT AUBURN STREET CAMBRIDGE, MA 02138		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
HOME FOR LITTLE WANDERERS 271 HUNTINGTON AVE BOSTON, MA 02115		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	30,000
Total ► 3a				966,250

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				
HUMAN RIGHTS WATCH 350 FIFTH AVE NEW YORK, NY 10118		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
INSTITUTE OF CONTEMPORARY ART 100 NORTHERN AVENUE BOSTON, MA 02210		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	2,500
INSTITUTE FOR INTERNATIONAL EDU 1400 K ST NW 650 WASHINGTON, DC 20005		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	1,000
INT RESCUE COMMITTEE 122 EAST 42ND ST NY, NY 10168		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	500
INTERNATIONAL DEVELOPMENT EXCHANGE 2120 UNIVERSITY AVE BERKELEY, CA 94704		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	10,000
INTERNATIONAL OCD FOUNDATION PO BOX 961029 BOSTON, MA 02196		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
MARTHA'S VINEYARD CMTY SERVICES 111 EDGARTOWN ROAD VINEYARD HAVEN, MA 02568		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	2,500
MARTHA'S VINEYARD HEBREW CENTER 130 CENTER STREET VINEYARD HAVEN, MA 02568		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
MARTHA'S VINEYARD SUMMER INSTITUTE PO BOX 692 VINEYARD HAVEN, MA 02568		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	3,000
MARTHA'S VINYARD'S FILM SOCIETY 79 BEACH ROAD VINEYARD HAVEN, MA 02568		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
MASS AUDUBON 500 WALK HILL STREET MATTAPAN, MA 02126		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	1,000
MASS GENERAL HOSPITAL 100 CAMBRIDGE ST BOSTON, MA 02114		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	75,000
MASS SOC FOR PREVENTION OF CRUELTY 3815 WASHINGTON ST BOSTON, MA 02130		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
MASSACHUSETTS INSTITUTE FOR TECHNOL 600 MEMORIAL DRIVE CAMBRIDGE, MA 02139		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	180,000
MASSACHUSETTS TAXPAYERS FOUNDATION 323 WASHINGTON STREET BOSTON, MA 02108		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	1,000
Total ►				966,250
3a				

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				
MCMULLEN MUSEUM 140 COMMONWEALTH AVE CHESTNUT HILL, MA 02467		501(C)(3)	TO SUPPORT ORG 'S TAX- EXEMPT PURPOSE	1,000
MERCY CORPS 45 SW ANKENY ST PORTLAND, OR 97204		501(C)(3)	TO SUPPORT ORG 'S TAX- EXEMPT PURPOSE	250
MOREHOUSE ALUMNI ASSOCIATION OF BOS 32 HAWTHORNE ST ROXBURY, MA 02119		501(C)(3)	TO SUPPORT ORG 'S TAX- EXEMPT PURPOSE	1,000
MUSEUM OF AFRICAN AMERICAN HISTORY 14 BEACON STREET BOSTON, MA 02108		501(C)(3)	TO SUPPORT ORG 'S TAX- EXEMPT PURPOSE	500
MUSEUM OF FINE ARTS BOSTON 465 HUNTINGTON AVE BOSTON, MA 02115		501(C)(3)	TO SUPPORT ORG 'S TAX- EXEMPT PURPOSE	10,750
NATIONAL PARKS CONSERVATION ASSOCIA 777 6TH AVE NW WASHINGTON, DC 20001		501(C)(3)	TO SUPPORT ORG 'S TAX- EXEMPT PURPOSE	250
NATURAL RESOURCES DEFENSE COUNCIL 40 WEST 20TH STREET NEW YORK, NY 10011		501(C)(3)	TO SUPPORT ORG 'S TAX- EXEMPT PURPOSE	25,000
NEVUS OUTREACH INC 600 SE DELAWARE AVE BARTLESVILLE, OK 74003		501(C)(3)	TO SUPPORT ORG 'S TAX- EXEMPT PURPOSE	10,000
NEW ENGLAND AQUARIUM ONE CENTRAL WHARF BOSTON, MA 02110		501(C)(3)	TO SUPPORT ORG 'S TAX- EXEMPT PURPOSE	250
NEW REPERTORY THEATRE 321 ARSENAL ST WATERTOWN, MA 02472		501(C)(3)	TO SUPPORT ORG 'S TAX- EXEMPT PURPOSE	2,000
NIPER NATIONAL INS FOR PSYCHOANALY 59 W 82ND NEW YORK, NY 10024		501(C)(3)	TO SUPPORT ORG 'S TAX- EXEMPT PURPOSE	500
PINE STREET INN 444 HARRISON AVE BOSTON, MA 02118		501(C)(3)	TO SUPPORT ORG 'S TAX EXEMPT PURPOSE	250
PLANNED PARENTHOOD 1055 COMMONWEALTH AVE BOSTON, MA 02215		501(C)(3)	TO SUPPORT ORG 'S TAX- EXEMPT PURPOSE	500
PMC JIMMY FUND 10 BROOKLINE PLACE WEST BROOKLINE, MA 02445		501(C)(3)	TO SUPPORT ORG 'S TAX- EXEMPT PURPOSE	500
PROTECT OUR DEFENDERS 20 PARK ROAD BURLINGAME, CA 94010		501(C)(3)	TO SUPPORT TAX-EXEMPT PURPOSE	1,000
Total ► 3a				966,250

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				
READING IS FUNDIMENTAL 1730 RHODE ISLAND AVE NW WASHINGTON, DC 20036		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
ROSIE'S PLACE 889 HARRISON AVE BOSTON, MA 02118		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
SECOND STEP INC PO BOX 600213 NEWTONVILLE, MA 02460		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
SOUTHERN POVERTY LAW CENTER 400 WASHINGTON AVE MONTGOMERY, AL 36104		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
STANFORD UNIVERSITY 450 SERRA MALL STANFORD, CA 94305		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	10,000
SUMMER SEARCH 500 SANSOME ST SAN FRANCISCO, CA 94111		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
TEACH FOR AMERICA 60 CANAL STREET 3RD FL BOSTON, MA 02114		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	1,250
TEMPLE ISRAEL 477 LONGWOOD AVE BOSTON, MA 02215		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	4,500
TENACITY 38 EVERETT STREET BOSTON, MA 02134		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	5,000
UASPIRE 31 ST JAMES AVE SUITE 520 BOSTON, MA 02116		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
UNITED WAY OF MASS BAY 51 SLEEPER STREET BOSTON, MA 02210		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	10,000
URBAN INSTITUTE 2100 M ST NW WASHINGTON, DC 20037		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	150,000
VINEYARD HOUSE 15 CHURCH STREET VINEYARD HAVEN, MA 02568		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	500
VINEYARD PLAYHOUSE 24 CHURCH STREET VINEYARD HAVEN, MA 02568		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	5,000
WATERKEEPER ALLIANCE 180 MAIDEN LANE SUITE603 NEW YORK, NY 10038		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	10,000
Total ► 3a				966,250

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
WBUR 890 COMMONWEALTH AVE 3F BOSTON, MA 02215		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	10,000
WGBH ONE GUEST STREET BOSTON, MA 02135		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	25,000
WOMEN'S REFUGEE COMMISSION 122 EAST 42ND ST NY, NY 10168		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	25,000
WORLD WILDLIFE FUND 1250 24TH ST NW WASHINGTON, DC 20037		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	250
YALE LAW SCHOOL PO BOX 2038 NEW HAVEN, CT 06521		501(C)(3)	TO SUPPORT ORG 'S TAX-EXEMPT PURPOSE	1,000
Total ▶ 3a				966,250

TY 2016 Accounting Fees Schedule**Name:** THE ASHURST FOUNDATION

C/O ELIZABETH K POZEN

EIN: 20-6325176

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	2,500	2,500		

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2016 Gain/Loss from Sale of Other Assets Schedule

Name: THE ASHURST FOUNDATION

C/O ELIZABETH K POZEN

EIN: 20-6325176

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
FIDELITY ADVISOR NEW INSIGHTS FUND C	2014-04	PURCHASE	2016-05		29,115	30,118			-1,003	
WISDOMTREE TR EMERGI NG MKTS HIGH DI	2013-04	PURCHASE	2016-04		50,973	76,364			-25,391	
WISDOMTREE TR EMERGI NG MKTS HIGH DI	2013-04	PURCHASE	2016-05		37,304	59,340			-22,036	
WISDOMTREE TR EMERGI NG MKTS HIGH DI	2013-04	PURCHASE	2016-05		142,434	226,716			-84,282	
WISDOMTREE TR EMERGI NG MKTS HIGH DI	2013-04	PURCHASE	2016-05		230,608	370,910			-140,302	
WISDOMTREE TR EMERGI NG MKTS HIGH DI	2013-04	PURCHASE	2016-10		116,790	166,422			-49,632	
WISDOMTREE TR EMERGI NG MKTS HIGH DI	2013-12	PURCHASE	2016-10		37,858	50,877			-13,019	
SISDOMTREE TR SMALL AP EARNINGS FD	2013-04	PURCHASE	2016-04		100,481	77,762			22,719	
SISDOMTREE TR SMALL AP EARNINGS FD	2013-04	PURCHASE	2016-10		250,206	186,629			63,577	
ADVANSIX INC COM	2003-01	PURCHASE	2016-10		5	1			4	
FIDELITY ADVISOR NEW INSIGHTS FUND C	2003-12	PURCHASE	2016-05		441,515	203,700			237,815	
FIDELITY ADVISOR NEW INSIGHTS FUND C	2010-12	PURCHASE	2016-05		330	152			178	
FIDELITY ADVISOR NEW INSIGHTS FUND C	2011-02	PURCHASE	2016-05		3,682	1,698			1,984	

TY 2016 Investments Corporate Bonds Schedule**Name:** THE ASHURST FOUNDATION

C/O ELIZABETH K POZEN

EIN: 20-6325176

Name of Bond	End of Year Book Value	End of Year Fair Market Value
PERELLA AND WEINBERG DEBENTURES	400,000	400,000

TY 2016 Investments Corporate Stock Schedule

Name: THE ASHURST FOUNDATION
C/O ELIZABETH K POZEN
EIN: 20-6325176

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ADVANSIX INC COM	2,812	2,812
ALTRIA GROUP INC	327,957	327,957
AT&T INC COM	537,579	537,579
BCE INC COM NEW	4,825,670	4,825,670
CONOCOPHILLIPS	130,364	130,364
CYS INVTS INC COM	876,938	876,938
DEERE & COMPANY	164,864	164,864
EXXON MOBIL CORP	292,442	292,442
GENERAL ELECTRIC CO COM	170,640	170,640
GILEAD SCIENCES INC	281,427	281,427
GOLDMAN SACHS GROUP INC COM	250,225	250,225
HONEYWELL INTL INC	368,982	368,982
INTEL CORP COM	181,350	181,350
INTL BUSINESS MACHINES	87,145	87,145
JOHNSON & JOHNSON	218,899	218,899
JPMORGAN CHASE & CO	391,757	391,757
KRAFT FOODS INC CL A	97,624	97,624
MONDELEZ INTL INC	148,771	148,771
MONSANTO CO	241,983	241,983
NIelsen HOLDINGS	780,270	780,270
NIKE INC	240,426	240,426
PFIZER INC COM	121,800	121,800
PHILIP MORRIS INTL INC	254,800	254,800
PROCTER & GAMBLE CO COM		
UNITED TECHNOLOGIES CORP	187,998	187,998
VERIZON COMMUNICATIONS INC	517,786	517,786
AVALONBAY CMNTYS INC COM	38,087	38,087
DIGITAL RLTY TR INC COM	54,043	54,043
UDR INC COM	40,128	40,128

TY 2016 Investments - Other Schedule**Name:** THE ASHURST FOUNDATION

C/O ELIZABETH K POZEN

EIN: 20-6325176

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ALPS ETF TR ALERIAN MLP EFT	FMV	361,872	361,872
DFA U.S. CORE EQUITY 1 PORTFOLIO	FMV	1,267,122	1,267,122
EATON VANCE FLOATING RATE INCOME TR	FMV	385,389	385,389
FIDELITY ADVISOR NEW INSIGHTS CL	FMV	315,582	315,582
FIDELITY FLOATING RATE HIGH INC	FMV		
JPMORGAN CHASE & CO ALERIAN MLP INDE	FMV	139,084	139,084
POWERSHARES GLOBAL EXCHANGE	FMV	460,638	460,638
SELECT SECTOR SPDR TR UTILS	FMV	138,425	138,425
SPDR INDEX SHS FDS S&P INTL DIV	FMV	802,515	802,515
SPDR SER TR S&P REGL BKG	FMV	211,166	211,166
VANGUARD INDEX FDS VANGUARD REIT EFT	FMV	539,334	539,334
VANGUARD WORLD FDS VANGUARD CONSUMER	FMV	173,705	173,705
WISDOMTREE TR DIVID EX-FINANCIALS FD	FMV	1,202,390	1,202,390
WISDOMTREE TR EMERGING MKTS EQUITY	FMV		
WISDOMTREE TR EUROPE SMALLCAP DIVID	FMV	645,882	645,882
WISDOMTREE TR MIDCAP DIVID FD	FMV	572,415	572,415
WISDOMTREE TR SMALLCAP EARNINGS FD	FMV	1,005,589	1,005,589

TY 2016 Other Expenses Schedule

Name: THE ASHURST FOUNDATION
C/O ELIZABETH K POZEN

EIN: 20-6325176

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
STATE FILING FEES	250			

TY 2016 Other Income Schedule**Name:** THE ASHURST FOUNDATION

C/O ELIZABETH K POZEN

EIN: 20-6325176**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
PERSHING LL - 434	9,144	9,144	

TY 2016 Other Increases Schedule

Name: THE ASHURST FOUNDATION
C/O ELIZABETH K POZEN

EIN: 20-6325176

Description	Amount
CHANGE IN FAIR MARKET VALUE	1,839,962

TY 2016 Other Professional Fees Schedule

Name: THE ASHURST FOUNDATION
C/O ELIZABETH K POZEN

EIN: 20-6325176

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FIRST REPUBLIC SECURITIES	32,941	32,941		

TY 2016 Taxes Schedule

Name: THE ASHURST FOUNDATION
C/O ELIZABETH K POZEN

EIN: 20-6325176

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX WITHHELD-457	33,732	33,732		
FOREIGN TAX WITHHELD-434	4,818	4,818		

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
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Name of the organization THE ASHURST FOUNDATION C/O ELIZABETH K POZEN	Employer identification number 20-6325176
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Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	<input type="checkbox"/> 501(c)() (enter number) organization
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	<input type="checkbox"/> 527 political organization
Form 990-PF	<input checked="" type="checkbox"/> 501(c)(3) exempt private foundation
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation
	<input type="checkbox"/> 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 THE ASHURST FOUNDATION C/O ELIZABETH K POZEN	Employer identification number 20-6325176
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Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ROBERT C POZEN 9 ARLINGTON STREET BOSTON, MA 021163410	\$ 250,000	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
-		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
-		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
-		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
-		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
-		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
-		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
-		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

20-6325176

Schedule B (Form 990, 990-EZ, or 990-PF) (2016)

Name of organization THE ASHURST FOUNDATION C/O ELIZABETH K POZEN	Employer identification number 20-6325176
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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	