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Form **990-PF**
Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ **Do not enter social security numbers on this form as it may be made public.**
▶ **Information about Form 990-PF and its instructions is at *www.irs.gov/form990pf*.**

OMB No 1545-0052

2016

Open to Public Inspection

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

Name of foundation
BERNARD G AND NANCY J BERKMAN FOUNDATION

A Employer identification number
22-2777796

Number and street (or P O box number if mail is not delivered to street address)
842A BEACON STREET

Room/suite

B Telephone number (see instructions)
(617) 266-6100

City or town, state or province, country, and ZIP or foreign postal code
BOSTON, MA 02215

C If exemption application is pending, check here ▶ ☐

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

D 1. Foreign organizations, check here ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

H Check type of organization ☑ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

I Fair market value of all assets at end of year *(from Part II, col (c), line 16)* ▶$ 935,117

J Accounting method ☑ Cash ☐ Accrual ☐ 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 ▶ ☐

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)	92,030			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	5,039	5,039		
	4	Dividends and interest from securities	21,566	21,566		
	5a	Gross rents				
	b	Net rental income or (loss) _____				
	6a	Net gain or (loss) from sale of assets not on line 10	-3,521			
	b	Gross sales price for all assets on line 6a 161,858				
	7	Capital gain net income (from Part IV, line 2)		0		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)	528	528		
	12	**Total.** Add lines 1 through 11	115,642	27,133		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0	0		0
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	2,500	1,250		1,250
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	1,232	437		0
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	871	0		0
	24	**Total operating and administrative expenses.** Add lines 13 through 23	4,603	1,687		1,250
	25	Contributions, gifts, grants paid	85,295			85,295
	26	**Total expenses and disbursements.** Add lines 24 and 25	89,898	1,687		86,545
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	25,744			
	b	**Net investment income** (if negative, enter -0-)		25,446		
	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	42,340	93,060	93,060
	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)	458,730	475,103	687,327
	c Investments—corporate bonds (attach schedule)	50,194	50,194	57,970
	11 Investments—land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	65,769	24,420	96,760
	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)	617,033	642,777	935,117
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	617,033	642,777	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg , and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 **Total net assets or fund balances** (see instructions)	617,033	642,777	
	31 **Total liabilities and net assets/fund balances** (see instructions)	617,033	642,777	

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	617,033
2	Enter amount from Part I, line 27a	2	25,744
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	642,777
5	Decreases not included in line 2 (itemize) ▶	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	642,777

Part IV Capital Gains and Losses for Tax on Investment Income

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

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

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

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 }	2	-3,521
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	59,102	776,610	0 076103
2014	62,812	735,816	0 085364
2013	63,452	683,458	0 092840
2012	59,949	604,771	0 099127
2011	53,657	561,755	0 095517

2	**Total** of line 1, column (d)	2	0 448951
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 089790
4	Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	861,352
5	Multiply line 4 by line 3	5	77,341
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	254
7	Add lines 5 and 6	7	77,595
8	Enter qualifying distributions from Part XII, line 4	8	86,545

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	254
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	254
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	254
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016 — 6a: 560		
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	560
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	306
11	Enter the amount of line 10 to be **Credited to 2017 estimated tax** ▶ 306 **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)?	1b		No
	*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*			
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? *If "Yes," attach a detailed description of the activities*	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? *If "Yes," attach a conformed copy of the changes*	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? *If "Yes," attach the statement required by General Instruction T*	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? *If "Yes," complete Part II, col (c), and Part XV*	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? *If "No," attach explanation* .	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)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	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?	13	Yes	

Website address ▶ N/A

14 The books are in care of ▶ BERNARD G BERKMAN Telephone no ▶ (617) 266-6100

Located at ▶ 842A BEACON ST BOSTON MA ZIP+4 ▶ 02215

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?	16		No

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 ▶

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

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

1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ 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)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016?	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)?			5b	
	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)				
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?			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?	☐ Yes	☑ No		
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?			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
BERNARD G BERKMAN 842A BEACON STREET BOSTON, MA 02215	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	(d) Contributions to employee benefit plans and deferred compensation	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	735,328
b	Average of monthly cash balances	1b	67,701
c	Fair market value of all other assets (see instructions)	1c	71,440
d	**Total** (add lines 1a, b, and c)	1d	874,469
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	874,469
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	13,117
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	861,352
6	**Minimum investment return.** Enter 5% of line 5	6	43,068

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	43,068
2a	Tax on investment income for 2016 from Part VI, line 5	2a	254		
b	Income tax for 2016 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	254
3	Distributable amount before adjustments Subtract line 2c from line 1			3	42,814
4	Recoveries of amounts treated as qualifying distributions			4	0
5	Add lines 3 and 4			5	42,814
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	42,814

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1a	86,545
b	Program-related investments—total from Part IX-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	86,545
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	254
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	86,291

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				42,814
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. 26,046				
b From 2012. 30,199				
c From 2013. 29,757				
d From 2014. 26,532				
e From 2015. 20,905				
f Total of lines 3a through e.	133,439			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ $ 86,545				
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.				42,814
e Remaining amount distributed out of corpus	43,731			
5 Excess distributions carryover applied to 2016	0			0
(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	177,170			
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) . . .	26,046			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	151,124			
10 Analysis of line 9				
a Excess from 2012. . . . 30,199				
b Excess from 2013. . . . 29,757				
c Excess from 2014. . . . 26,532				
d Excess from 2015. . . . 20,905				
e Excess from 2016. . . . 43,731				

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)

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

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))

BERNARD G BERKMAN

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

BERNARD G BERKMAN BERNARD G BERKMAN
842A BEACON STREET
BOSTON, MA 02215
(617) 266-6100

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

LETTER DETAILING THE USE OF THE REQUESTED FUNDS, IRS EXEMPTION

c Any submission deadlines

NONE

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

NONE

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year* See Additional Data Table				
Total . . . . . ▶ **3a**				85,295
b *Approved for future payment*				
Total . . . . . ▶ **3b**				0

Part XVI-A Analysis of Income-Producing Activities

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	5,039	
4 Dividends and interest from securities. . . .			14	21,566	
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.	523000	520	01	8	
8 Gain or (loss) from sales of assets other than inventory			18	-3,521	
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). .		520		23,092	0
13 **Total.** Add line 12, columns (b), (d), and (e).				13	23,612

(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 **Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations**

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501 (c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash	1a(1)		No
(2) Other assets	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization	1b(2)		No
(3) Rental of facilities, equipment, or other assets	1b(3)		No
(4) Reimbursement arrangements	1b(4)		No
(5) Loans or loan guarantees	1b(5)		No
(6) Performance of services or membership or fundraising solicitations	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		No

d If the answer to any of the above is "Yes," complete the following schedule Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received

(a) Line No	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

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

****** | 2017-04-07 | ******

Signature of officer or trustee | Date | Title

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶ ☐	PTIN
DAVID A MARCUS CPA				P00188900
Firm's name ▶ SAMET & COMPANY PC				Firm's EIN ▶04-3027605
Firm's address ▶ 1330 BOYLSTON STREET CHESTNUT HILL, MA 024672111				Phone no (617) 731-1222

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

List and describe the kind(s) of property sold (e g , real estate, **(a)** 2-story brick warehouse, or common stock, 200 shs MLC Co)	**(b)** How acquired P—Purchase D—Donation	**(c)** Date acquired (mo , day, yr)	**(d)** Date sold (mo , day, yr)
ENTERPRISE PRODUCTS K-1	P		2016-12-31
CLIFFS NATURAL RESOURCES, INC	P	2013-08-31	2016-11-16
POTASH CORP OF SASKATCHEWAN INC	P	2014-01-31	2016-12-23
ROYAL DUTCH SHELL	P	2013-11-30	2016-12-23
TECO ENERGY INC	P	2002-09-06	2016-07-01
TOTAL S A FRANCE	P	2011-11-09	2016-05-16
BARCLAYS BANK	P	2006-04-21	2016-09-15
MORGAN STANLEY	P	2007-04-19	2016-08-03
PEPCO HOLDINGS INC	P	2000-11-09	2016-03-25
TECO ENERGY INC	P	2002-09-06	2016-07-01

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

(e) Gross sales price	Depreciation allowed **(f)** (or allowable)	Cost or other basis **(g)** plus expense of sale	Gain or (loss) **(h)** (e) plus (f) minus (g)
		22	-22
8,020		24,771	-16,751
5,446		10,209	-4,763
16,324		19,548	-3,224
15,351		9,442	5,909
24,417		25,180	-763
25,000		25,000	0
12,500		12,500	0
27,250		22,292	4,958
27,550		16,415	11,135

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			Gains (Col (h) gain minus col (k), but not less than -0-) **or** **(l)** Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis **(j)** as of 12/31/69	Excess of col (i) **(k)** over col (j), if any	
			-22
			-16,751
			-4,763
			-3,224
			5,909
			-763
			0
			0
			4,958
			11,135

Form 990PF Part XV Line 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 *Paid during the year*				
ADL-ANTI-DEFAMATION LEAGUE 1 PARK DRIVE BACO RATON, FL 33487		OTHER PUBLIC CHARITI	WELFARE	100
ALZHEIMERS ASSOCIATION 311 ARSENAL ST WATERTOWN, MA 02472		OTHER PUBLIC CHARITI	RESEARCH	100
AMERICAN ACADEMY OF OPTHAMOLOGY PO BOX 7424 SAN FRANCISCO, CA 94120		OTHER PUBLIC CHARITI	RESEARCH	50
AMERICAN CANCER SOCIETY 30 SPEEN STREET FRAMINGHAM, MA 01701		OTHER PUBLIC CHARITI	RESEARCH	200
AMERICAN DIABETES ASSOCIATION 330 CONGRESS STREET BOSTON, MA 022101216		OTHER PUBLIC CHARITI	EDUCATION	100
AMERICAN HEART ASSOCIATION 300 5TH AVE WALTHAM, MA 02451		OTHER PUBLIC CHARITI	EDUCATION	100
AMERICAN LUNG ASSOCIATION 14 BEACON ST STE 717 BOSTON, MA 10018		OTHER PUBLIC CHARITI	EDUCATION	100
AMERICAN RED CROSS OF MA BAY 139 MAIN ST CAMBRIDGE, MA 02142		OTHER PUBLIC CHARITI	WELFARE	100
AMERICAN TECHNION SOCIETY 55 EAST 59TH ST NEW YORK, NY 10022		OTHER PUBLIC CHARITI	RESEARCH	100
BABSON COLLEGE - SCHOLARSHIP FUND BABSON PARK WELLESLEY, MA 02457		OTHER PUBLIC CHARITI	EDUCATION	5,000
BABSON COLLEGE BABSON PARK WELLESLEY, MA 02457		OTHER PUBLIC CHARITI	EDUCATION	1,600
BETH ISRAEL DECONESS MEDICAL - DEWOLF 330 BROOKLINE AVE BOSTON, MA 02215		OTHER PUBLIC CHARITI	RESEARCH	1,000
BETH MENACHEM CHABAD OF NEWTON 349 DEDHAM STRRET NEWTON, MA 02459		OTHER PUBLIC CHARITI	RESEARCH	200
BOSTON RESCUE MISSION PO BOX 849100 BOSTON, MA 022849100		OTHER PUBLIC CHARITI	WELFARE	200
BOYS & GIRLS CLUB OF BOSTON 50 CONGRESS ST BOSTON, MA 02109		OTHER PUBLIC CHARITI	WELFARE	100
Total . . . . . ▶ 3a				85,295

Form 990PF Part XV Line 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 *Paid during the year*				
BRIGHAM & WOMEN'S HOSPITAL 116 HUNTINGTON AVE 5TH FLOOR BOSTON, MA 02116		OTHER PUBLIC CHARITI	RESEARCH	1,550
THE CAPE COD HOSPITAL FOUNDATION 32 MAIN ST HYANNIS, MA 02601		OTHER PUBLIC CHARITI	RESEARCH	100
CARROLL CENTER FOR THE BLIND 770 CENTRE ST NEWTON, MA 02458		OTHER PUBLIC CHARITI	WELFARE	100
CHILDREN'S HOSPITAL BOSTON PO BOX 414428 BOSTON, MA 022414428		OTHER PUBLIC CHARITI	WELFARE	1,000
CHILDREN'S TUMOR FOUNDAITON 400 CROWN COLONY DR STE 601 QUINCY, MA 02169		OTHER PUBLIC CHARITI	RESEARCH	100
COMBINED JEWISH PHILANTHROPIES 126 HIGH STREET BOSTON, MA 021102700		OTHER PUBLIC CHARITI	WELFARE	25,000
CROHN'S & COLITIS FOUNDATION 72 RIVER PARK ST 202 NEEDHAM, MA 02494		OTHER PUBLIC CHARITI	RESEARCH	100
DANA FARBER CANCER INSTITUTE 10 BROOKLINE PL WEST BROOKLINE, MA 02445		OTHER PUBLIC CHARITI	RESEARCH	1,000
DOCTORS WITHOUT BORDERS PO BOX 5022 HAGERSTOWN, MD 217415023		OTHER PUBLIC CHARITI	WELFARE	200
FACING HISTORY AND OURSELVES 16 HURD ROAD BROOKLINE, MA 021466919		OTHER PUBLIC CHARITI	EDUCATION	100
FRIENDS OF ETHIOPIAN JEWS INC PO BOX 960059 BOSTON, MA 02196		OTHER PUBLIC CHARITI	WELFARE	100
FRIENDS OF IDF 154 WELLS AVE STE 3 NEWTON, MA 02459		OTHER PUBLIC CHARITI	WELFARE	100
FRIENDS OF THE NE HOLOCAUST MUSEUM 126 HIGH ST BOSTON, MA 02110		OTHER PUBLIC CHARITI	EDUCATION	100
FULL PLATE KOSHER PANTRY 100 NIANTIC AVE PROVIDENCE, RI 02907		OTHER PUBLIC CHARITI	WELFARE	100
GLOBE SANTA PO BOX 55820 BOSTON, MA 022055820		OTHER PUBLIC CHARITI	WELFARE	200
Total . . . . . ▶ 3a				85,295

Form 990PF Part XV Line 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 *Paid during the year*				
GREATER BOSTON FOOD BANK 99 ATKINSON ST BOSTON, MA 02118		OTHER PUBLIC CHARITI	WELFARE	200
HABITAT FOR HUMANITY PO BOX 1167 AMERICUS, GA 31709		OTHER PUBLIC CHARITI	WELFARE	100
HAVANESE RESCUE INC CO JOHN VICS TREASURER 638 DAVINCI PASS POINCIANA, FL 34759		OTHER PUBLIC CHARITI	WELFARE	100
HOSPICE OF THE GOOD SHEPERD 2042 BEACON STREET NEWTON, MA 02168		OTHER PUBLIC CHARITI	WELFARE	200
HUMANE SOCIETY OF SARASOTA COUNTY 2331 15TH ST SARASOTE, FL 34237		OTHER PUBLIC CHARITI	WELFARE	100
IETF (INTL ESSENTIAL TREMOR FOUNDATION) PO BOX 14005 LENEXA, KS 66285		OTHER PUBLIC CHARITI	RESEARCH	100
ISRAEL TENNIS CENTERS 57 WEST 38TH ST NEW YORK, NY 10018		OTHER PUBLIC CHARITI	WELFARE	2,500
JEWISH BIG BROTHER & SISTER ASSOCIATION 333 NAHANTON ST NEWTON, MA 02459		OTHER PUBLIC CHARITI	WELFARE	100
JEWISH COMMUNITY HOUSING FOR THE ELDERLY 30 WALLINGFORD RD BRIGHTON, MA 02135		OTHER PUBLIC CHARITI	WELFARE	200
JEWISH FAMILY & CHILDREN'S SERVICE 475 FRANKLIN ST STE 101 FRAMINGHAM, MA 01702		OTHER PUBLIC CHARITI	WELFARE	300
JEWISH GUILD FOR THE BLIND 15 WEST 65TH ST NEW YORK, NY 100236601		OTHER PUBLIC CHARITI	WELFARE	200
JEWISH VOCATIONAL SERVICE 75 FEDERAL ST 3RD FLOOR BOSTON, MA 02110		OTHER PUBLIC CHARITI	WELFARE	200
JUVENILE DIABETES RESEARCH FOUNDATION 60 WALNUT ST WELLESLEY HILLS, MA 02481		OTHER PUBLIC CHARITI	RESEARCH	200
LEUKEMIA & LYMOHOMA SOCIETY PO BOX 9031 PITTSFIELD, MA 01202		OTHER PUBLIC CHARITI	RESEARCH	100
MAKE-A-WISH FOUNDATION ONE BULFICH PLACE STE 202 BOSTON, MA 02114		OTHER PUBLIC CHARITI	WELFARE	100
Total . . . . . ▶ 3a				85,295

Form 990PF Part XV Line 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 *Paid during the year*				
MARINE CORPS SCHOLARSHIP FOUNDATION PO BOX 759468 BALTIMORE, MD 21275		OTHER PUBLIC CHARITI	EDUCATION	100
MASS ASSOC OF OLDER AMERICANS 19 TEMPLE PLACE 4TH FLOOR BOSTON, MA 02111		OTHER PUBLIC CHARITI	EDUCATION	100
MASSACHUSETTS GENERAL HOSPITAL 165 CAMBRIDGE ST STE 600 BOSTON, MA 02114		OTHER PUBLIC CHARITI	RESEARCH	5,000
MIRACLE LEAGUE OF MANASOTA 8466 N LOCKWOOD RIDGE RD SARASOTA, FL 34243		OTHER PUBLIC CHARITI	WELFARE	100
MJPA SCHOLARSHIP FUND PO BOX 21 TAUNTON, MA 02780		OTHER PUBLIC CHARITI	EDUCATION	100
MULTIPLE MYELOMA RESEARCH FOUNDATION 383 MZAIN AVE 5TH FL NORWALK, CT 06851		OTHER PUBLIC CHARITI	RESEARCH	100
NATIONAL KIDNEY FOUNDATION OF MA INC 85 ASTOR AVE STE 2 NORWOOD, MA 020625040		OTHER PUBLIC CHARITI	RESEARCH	100
NATIONAL MULTIPLE SCLEROSIS SOCIETY 101A FIRST AVENUE SUITE 6 WALTHAM, MA 02154		OTHER PUBLIC CHARITI	RESEARCH	100
NEW ENGLAND HOME FOR LITTLE WANDERERS 271 HUNTINGTON AVE BOSTON, MA 02115		OTHER PUBLIC CHARITI	WELFARE	100
NEW ENGLAND VILLAGES 664 SCHOOL STREET PEMBROKE, MA 02359		OTHER PUBLIC CHARITI	WELFARE	100
NEWTON FREE LIBRARY 330 HOMER STREET NEWTON CENTRE, MA 02159		OTHER PUBLIC CHARITI	EDUCATION	100
NEWTON-WELLESLY HOSPITAL 2014 WASHINGTON STREET NEWTON, MA 021629901		OTHER PUBLIC CHARITI	RESEARCH	31,000
PARALYZED VETERANS OF AMERICA 7 MILL RD BOX 9533 WILTON, NJ 03086		OTHER PUBLIC CHARITI	RESEARCH	100
PARKINSONS ACTION NETWORK 1025 VERMONT AVE NW WASHINGTON, DC 20005		OTHER PUBLIC CHARITI	RESEARCH	100
PERKINS SCHOOL FOR THE BLIND 175 NORTH BEACON STREET WATERTOWN, MA 02472		OTHER PUBLIC CHARITI	RESEARCH	200
Total . . . . . ▶ 3a				85,295

Form 990PF Part XV Line 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 *Paid during the year*				
PROJECT BREAD 145 BORDER STREET BOSTON, MA 02128		OTHER PUBLIC CHARITI	WELFARE	100
PROSTATE CANCER FOUNDATION 1250 FOURTH ST SANTA MONICA, CA 90401		OTHER PUBLIC CHARITI	RESEARCH	100
ROFEH INTERNATIONAL 1710 BEACON ST BROOKLINE, MA 02445		OTHER PUBLIC CHARITI	RELIGIOUS	300
SALVATION ARMY PO BOX 55876 BOSTON, MA 02215		OTHER PUBLIC CHARITI	WELFARE	100
SARASOTA MANATEE JEWISH FEDERATION 580 MCINTOSH RD SARASOTA, FL 34202		OTHER PUBLIC CHARITI	WELFARE	1,000
SCHEPENS EYE RESEARCH 20 STANIFORD ST BOSTON, MA 02114		OTHER PUBLIC CHARITI	RESEARCH	1,000
SHRINERS CIRCUS 99 FORDHAM RD WILMINGTON, MA 01887		OTHER PUBLIC CHARITI	WELFARE	45
SHRINERS HOSPITAL FOR CHILDREN 2900 ROCKY POINT DR TAMPA, FL 33607		OTHER PUBLIC CHARITI	WELFARE	200
SOUTHEASTERN GUIDE DOGS 4210 77TH STREET E PALMETTO, FL 34221		OTHER PUBLIC CHARITI	WELFARE	200
SPECIAL OLYMPICS 650 ELM ST STE 200 MANCHESTER, NH 03101		OTHER PUBLIC CHARITI	WELFARE	100
SPARCC-SAFE PLACE AND RAPE CRISIS CTR 1410 FLORA AVE N LEHIGH ACRES, FL 33971		OTHER PUBLIC CHARITI	WELFARE	100
SPRINGWELL (TRAVELING MEALS OF NEWTON) 307 WAVERLY OAKS RD STE 205 WALTHAM, MA 02452		OTHER PUBLIC CHARITI	RESEARCH	100
TEMPLE ISRAEL 477 LONGWOOD AVE BOSTON, MA 02215		OTHER PUBLIC CHARITI	RELIGIOUS	50
TZEDAKAH FUND INC 12701 N SCOTTSDALE RD SCOTTSDALE, AZ 85254		OTHER PUBLIC CHARITI	RELIGIOUS	100
VILNA SHUL BCJC 18 PHILLIPS ST BOSTON, MA 02114		OTHER PUBLIC CHARITI	WELFARE	200
Total . . . . . ▶ 3a				85,295

Form 990PF Part XV Line 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 *Paid during the year*				
VISITING NURSE ASSOCIATION 500 RUTHERFORD AVE STE 200 CHARLESTOWN, MA 02129		OTHER PUBLIC CHARITI	WELFARE	100
WEDU PO BOX 31556 TAMPA, FL 33631		OTHER PUBLIC CHARITI	EDUCATION	100
WEST POINT JEWISH CHAPEL PO BOX 84 WEST POINT, NY 10996		OTHER PUBLIC CHARITI	RELIGIOUS	100
WGBH 1 GUEST ST BOSTON, MA 02135		OTHER PUBLIC CHARITI	EDUCATION	300
Total . . . . . ▶ 3a				85,295

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TY 2016 Accounting Fees Schedule

Name: BERNARD G AND NANCY J BERKMAN FOUNDATION

EIN: 22-2777796

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
SAMET & CO-PREP 990PF	2,500	1,250		1,250

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491102003087

TY 2016 Investments Corporate Bonds Schedule

Name: BERNARD G AND NANCY J BERKMAN FOUNDATION

EIN: 22-2777796

Name of Bond	End of Year Book Value	End of Year Fair Market Value
UBS FINANCIAL SERVICES INC	50,194	57,970

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491102003087

TY 2016 Investments Corporate Stock Schedule

Name: BERNARD G AND NANCY J BERKMAN FOUNDATION

EIN: 22-2777796

Name of Stock	End of Year Book Value	End of Year Fair Market Value
UBS FINANCIAL SERVICES INC	157,836	301,873
CHARLES SCHWAB	317,267	385,454

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491102003087

TY 2016 Investments - Other Schedule

Name: BERNARD G AND NANCY J BERKMAN FOUNDATION

EIN: 22-2777796

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ENTERPRISE PRODUCTS & BOARDKWALK PIPELINE LP	AT COST	7,484	71,440
UBS FINANCIAL SERVICES INC	AT COST	16,936	25,320

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TY 2016 Other Expenses Schedule

Name: BERNARD G AND NANCY J BERKMAN FOUNDATION

EIN: 22-2777796

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LOSS FROM K-1	781	0		0
NONDEDUCTIBLE EXPENSE PER K-1	4	0		0
DONATIONS PER K-1	3	0		0
INVESTMENT EXPENSES	83	0		0

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TY 2016 Other Income Schedule

Name: BERNARD G AND NANCY J BERKMAN FOUNDATION

EIN: 22-2777796

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
ENTERPRISE PRODUCTS PARTNERS	520	520	520
OTHER INCOME PER K-1	8	8	8

TY 2016 Taxes Schedule

Name: BERNARD G AND NANCY J BERKMAN FOUNDATION

EIN: 22-2777796

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MASS FORM PC	35	35		0
FOREIGN TAXES WITHHELD	319	319		0
FEDERAL TAXES	795	0		0
MASS FORM 990T-62	83	83		0

efile GRAPHIC print - DO NOT PROCESS | As Filed Data - | DLN: 93491102003087

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	Employer identification number
BERNARD G AND NANCY J BERKMAN FOUNDATION	22-2777796

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 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II

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

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc , purposes, but no such contributions totaled more than $1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose 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	Employer identification number
BERNARD G AND NANCY J BERKMAN FOUNDATION	22-2777796

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)

Name of organization	Employer identification number
BERNARD G AND NANCY J BERKMAN FOUNDATION	22-2777796

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
		$	
(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
BERNARD G AND NANCY J BERKMAN FOUNDATION

Employer identification number
22-2777796

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

Use duplicate copies of Part III if additional space is needed

(a) No.from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

(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

(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

(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

Additional Data

Software ID:

Software Version:

EIN: 22-2777796

Name: BERNARD G AND NANCY J BERKMAN 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
1	BERNARD AND NANCY BERKMAN 413D DEDHAM STREET NEWTON, MA02459	$ 7,030	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
2	842A BEACON CHILDREN TRUST 842A BEACON STREET BOSTON, MA02215	$ 15,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
3	CHESTER INVESTMENT TRUST 842A BEACON STREET BOSTON, MA02215	$ 15,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
4	CHEVELLE REALTY TRUST 842A BEACON STREET BOSTON, MA02215	$ 15,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
5	PILGRIM CAPITAL TRUST 842A BEACON STREET BOSTON, MA02215	$ 15,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
6	BERNARD G BERKMAN AND NANCY J BERKMAN FAMILY TRUST 842A BEACON STREET BOSTON, MA02215	$ 5,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)

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
7	BERNARD G BERKMAN FAMILY TRUST 842A BEACON STREET BOSTON, MA02215	$ 5,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
8	PARKER HILLSIDE REALTY TRUST 842A BEACON STREET BOSTON, MA02215	$ 15,000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)