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EXTENDED TO NOVEMBER 15, 2017

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 separate instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

For	calendar year 2016 or tax year beginning		, and ending		
	ne of foundation			A Employer identification	number
	HIRLEY & MILTON LEVY FAMI	LY			
	HARITABLE TRUST			22-6480716	
	nber and street (or P O box number if mail is not delivered to street	address)	Room/suite	B Telephone number	242
_	.O. BOX 9175			(508)390-2	
	or town, state or province, country, and ZIP or foreign po	ostal code		C If exemption application is p	ending, check here
	RAMINGHAM, MA 01701				
G	Check all that apply: Initial return	Initial return of a fo	ormer public charity	D 1. Foreign organizations	s, check here
	L Final return	Amended return		Foreign organizations me check here and attach co	eting the 85% test,
	Address change Check type of organization: X Section 501(c)(3) ex	Name change		1	
L .		empt private foundation Other taxable private founda	ation	E If private foundation sta	
1 F2		ng method: X Cash	Accrual	under section 507(b)(1)	
	· 1 —	her (specify)	Accidal	F If the foundation is in a under section 507(b)(1)	
(<i>ii</i>			basis)	under section 507 (b)(1)	(D), check here
	Analysis of Revenue and Expenses	(a) Revenue and	(b) Net investment	(c) Adjusted net	(d) Disbursements
	(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))	expenses per books	income	income	for charitable purposes (cash basis only)
	1 Contributions, gifts, grants, etc., received			N/A	
	2 Check X if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	74,637.	74,637.		STATEMENT 1
	5a Gross rents		_		
	b Net rental income or (loss)				
٩	6a Net gain or (loss) from sale of assets not on line 10	330,928.			<u> </u>
enn	b Gross sales price for all 331,013.				<u> </u>
Revenue	7 Capital gain net income (from Part IV, line 2)		330,928.		
	8 Net short-term capital gain			<u> </u>	 _
	9 Income modifications Gross sales less returns				
	10a and allowances			 	
	C Gross profit or (loss)			 	
	11 Other income	1,300.	0.		STATEMENT 2
	12 Total. Add lines 1 through 11	406,865.	405,565		
_	13 Compensation of officers, directors, trustees, etc	0.	0].	RESELE	0.
	14 Other employee salaries and wages		1,	LEON VEL	1 . 1
	15 Pension plans, employee benefits			ALU: 000	136
ses	16a Legal fees			23 201/	191
beuses	b Accounting fees STMT 3	1,250.	1,250.	000=	[12] O.
ŭ	c Other professional fees		<i>J</i>	OODEN, UT	-
Ę	17 Interest				
tra	18 Taxes STMT 4	8,945.	1,849.		0.
ij	19 Depreciation and depletion				
퉏	20 Occupancy				
Þ	21 Travel, conferences, and meetings	,			}
j an	22 Printing and publications 23 Other expenses			 	
ŧ,	24 Total operating and administrative			 	
Operating and Administrative	expenses Add lines 13 through 23	10,195.	3,099.		0.
Ö	25 Contributions, gifts, grants paid	325,000.		 	325,000.
	26 Total expenses and disbursements.			 	
	Add lines 24 and 25	335,195.	3,099.		325,000.
	27 Subtract line 26 from line 12:				
	8 Excess of revenue over expenses and disbursements	71,670.		<u> </u>	<u> </u>
	b Net investment income (if negative, enter -0-)		402,466.		
	c Adjusted net income (if negative, enter -0-)			N/A	
	LUA For Dengment Deduction Act Notice				Form 000 DE (2016)

22-6480716 CHARITABLE TRUST Form 990-PF (2016) Beginning of year End of year Part II Balance Sheets Atlached schedules and amounts in the description column should be for end-of-year amounts only (a) Book Value (b) Book Value (c) Fair Market Value 29,251 64,921 64,921. 1 Cash - non-interest-bearing 2 Savings and temporary cash investments 3 Accounts receivable ▶ Less: allowance for doubtful accounts 4 Pledges receivable ► Less: allowance for doubtful accounts 5 Grants receivable 6 Receivables due from officers, directors, trustees, and other disqualified persons 7 Other notes and loans receivable Less: allowance for doubtful accounts 8 Inventories for sale or use 9 Prepaid expenses and deferred charges 10a Investments - U.S and state government obligations 1,726. 4,050,108. STMT 5 1,811. b Investments - corporate stock c Investments - corporate bonds 11 Investments - land buildings, and equipment basis Less accumulated depreciation 12 Investments - mortgage loans 1,175,863. 1,211,948. 1,534,675. STMT 6 13 Investments - other 14 Land, buildings, and equipment basis Less accumulated depreciation 15 Other assets (describe ► 16 Total assets (to be completed by all filers - see the 1,206,925. 1,278,595. 5,649,704. instructions Also, see page 1, item I) 17 Accounts payable and accrued expenses 18 Grants payable 19 Deferred revenue 20 Loans from officers, directors, trustees, and other disqualified persons 21 Mortgages and other notes payable 22 Other liabilities (describe 0. 0 Total liabilities (add lines 17 through 22) Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. Vet Assets or Fund Balances 24 Unrestricted 25 Temporarily restricted 26 Permanently restricted $\triangleright [X]$ Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. 58,171 58,171 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg., and equipment fund 1,148,754. 1,220,424. 29 Retained earnings, accumulated income, endowment, or other funds 1,206,925. 1,278,595. 30 Total net assets or fund balances 1,206,925. 1,278,595 31 Total liabilities and net assets/fund balances 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 1,206,925 (must agree with end-of-year figure reported on prior year's return) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) Add lines 1, 2, and 3

623511 11-23-16

1,278,595.

Form **990-PF** (2016)

5 Decreases not included in line 2 (itemize)

11350717 756948 10728.031

6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30

		ses for Tax on								
2-story brick wai	rehouse; or	(s) of property sold (e common stock, 200 s	e.g., real estate, shs. MLC Co.)		(b) F	low acc - Purch - Donat	ion	c) Date a (mo., da	ay, yr.)	(d) Date sold (mo., day, yr.)
	1a 4000 SHS TJX COS INC NEW				I		6/2	5/98	12/14/16	
b CAPITAL GAINS I	DIVID	ends			L_					
C					↓					
d					↓_					
<u>e</u>	/0.D		1 (10)		١.,			410		<u> </u>
(e) Gross sales price		preciation allowed or allowable)		st or other basis expense of sale				(e) plus	un or (loss (f) minus	(g)
a 310,416. b 20,597.					35.					310,331
										20,397
<u>c</u>					 					
<u>d</u>			-}							
Complete only for assets showing	a dain in co	lumn (h) and owned b	hy the foundation	on 12/31/69				Gains (Co	ol. (h) gain	minus
Complete only for about one will		Adjusted basis		cess of col. (1)				(k), but n	ot less tha	n -0-) or
(i) F.M.V. as of 12/31/69		s of 12/31/69		col. (j), if any)			Losses ((from col	(h))
a			- -							310,331
b										20,597
c			+							
d			+							
e					$\neg \uparrow$					
*		C If main, also an	nter in Part I, line		7					
2 Capital gain net income or (net cap	pital loss)		· -0- in Part I, line		- }	2				330,928
3 Net short-term capital gain or (los	· ·c) ac dafina				1					
If gain, also enter in Part 1, line 8,		u III sections 1222(3)	anu (o).		1	1				
If (loss), enter -0- in Part I, line 8	` , ,				<i>ا</i> ار	3			N/A	
Part V Qualification U										
For optional use by domestic private	foundation	s subject to the section					ent Inc	ome		
(For optional use by domestic private If section 4940(d)(2) applies, leave th Was the foundation liable for the sect If "Yes," the foundation does not qual	e foundation his part blan tion 4942 ta lify under se	s subject to the section k. x on the distributable oction 4940(e). Do not	on 4940(a) tax on amount of any yet t complete this pa	net investment ii ear in the base pe irt.	ncome	9.)	ent Ince	ome		Yes X No
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SHIRLEY & MILTON LEVY FAMILY

Form 990-PF (2016)	CHARITABLE TRUST		10.40(1-) 40.40(1-)		64807			Page 4
	ax Based on Investment Income (Section 494			4948	- see ins	itru	CTIO	15)
1a Exempt operating four	idations described in section 4940(d)(2), check here 🕨 📖 and e		I	1				
Date of ruling or deterr				1 .	ł			
b Domestic foundations	that meet the section 4940(e) requirements in Part V, check here	X	and enter 1%	1	L		1,0	25.
of Part I, line 27b								
	ndations enter 2% of line 27b. Exempt foreign organizations enter 4%				ĺ			_
2 Tax under section 511	(domestic section 4947(a)(1) trusts and taxable foundations only. Of	thers en	ter -0-)	2				<u>0.</u>
3 Add lines 1 and 2				3			1,0	
4 Subtitle A (income) tax	c (domestic section 4947(a)(1) trusts and taxable foundations only. O	ithers er	nter -0-)	4				<u>0.</u>
5 Tax based on investm	ent income Subtract line 4 from line 3. If zero or less, enter -0-			5			1,0	<u> 25.</u>
6 Credits/Payments:					1			
a 2016 estimated tax pay	yments and 2015 overpayment credited to 2016	6a	3,600	<u>-</u>	ĺ			
b Exempt foreign organi	zations - tax withheld at source	6b						
c Tax paid with applicati	on for extension of time to file (Form 8868)	6c	4,900	•	l			
d Backup withholding er	roneously withheld	6d						
	nents. Add lines 6a through 6d			7	L	8	<u>3,5</u>	00.
8 Enter any penalty for a	underpayment of estimated tax. Check here $\overline{f X}$ if Form 2220 is atta	ched		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			1,4	75.
11 Enter the amount of lir	ne 10 to be: Credited to 2017 estimated tax		4,475. Refunded ▶	11				0.
Part VII-A State	ments Regarding Activities							
1a During the tax year, di	the foundation attempt to influence any national, state, or local legis	lation o	r did it participate or interver	ne in			Yes	No
any political campaign	7		_			1a		$\overline{\mathbf{x}}$
b Did it spend more than	s \$100 during the year (either directly or indirectly) for political purpor	ses (see	e instructions for the definition	л)?		1b		$\overline{\mathbf{x}}$
If the answer is "Yes	s" to 1a or 1b , attach a detailed description of the activities a	nd cop	oles of any materials publi	shed or	Γ	\neg		
	oundation in connection with the activities					İ		
c Did the foundation file	Form 1120-POL for this year?				ſ	1c		X
d Enter the amount (if ar	ny) of tax on political expenditures (section 4955) imposed during the	year:				\neg		
(1) On the foundation	. > \$ 0 . (2) On foundation managers	.▶\$	0	•		- {	1	
e Enter the reimburseme	ent (if any) paid by the foundation during the year for political expend	iture tax	imposed on foundation	_	1	l	1	
managers. > \$	0.					ı		
2 Has the foundation en	gaged in any activities that have not previously been reported to the !!	RS?				2	ŀ	X
If "Yes," attach a de	tailed description of the activities					\neg		
3 Has the foundation ma	de any changes, not previously reported to the IRS, in its governing	ınstrum	ent, articles of incorporation	, or	1	ł	l	
bylaws, or other simila	r instruments? If "Yes," attach a conformed copy of the chang	es			1	3		X
4a Did the foundation hav	ve unrelated business gross income of \$1,000 or more during the year	17				48		X
b If "Yes," has it filed a ta	x return on Form 990-T for this year?			N	[/A [4b		
5 Was there a liquidation	n, termination, dissolution, or substantial contraction during the year?	>			Γ	5		X
If "Yes," attach the	statement required by General Instruction T							
6 Are the requirements of	of section 508(e) (relating to sections 4941 through 4945) satisfied e	ither:			}	1	1	
By language in the g	overning instrument, or				}	ļ		
	hat effectively amends the governing instrument so that no mandator	y direct	ions that conflict with the st	ate law		l		
remain in the governin	a instrument?					6	Х	
-	ve at least \$5,000 in assets at any time during the year? If "Yes," cor	mplete	Part II, col (c), and Part	ΚV		7	X	
	, , , , , , , , , , , , , , , , , , , ,	•	, ,,,			$\neg \uparrow$		
	ch the foundation reports or with which it is registered (see instruction	ns) 🕨				1		
<u>MA</u>								
b If the answer is "Yes" t	o line 7, has the foundation furnished a copy of Form 990-PF to the A	ttorney	General (or designate)					
of each state as requir	ed by General Instruction G? If "No," attach explanation				L	8b	X	
	ning status as a private operating foundation within the meaning of se			alendar	[[
year 2016 or the taxab	le year beginning in 2016 (see instructions for Part XIV)? If "Yes," o	comple	te Part XIV .		L	9		<u>X</u>
10 Did any persons become	me substantial contributors during the tax year? # "Yes," attach a schedu	ule listing	their names and addresses .			10		<u>x</u>

11 At any time during the year, did the fruindation, directly or indirectly, own a controlled entity within the meaning of section 5(2b) (13)? If Yea, 'stach schedule' (see instructions) 11 July 15 broad the foundation make a distribution to a doner advised fund over which the foundation or a disqualided person had advisory printeges? 12 If Yea, 'stach schedule' (see instructions) 13 Did the foundation comply with the public inspection reputies members for its annual returns and exemption application? 14 The books are in car of PHE FELDBERG OFFICE 15 Section 4947(a)(1) nonexempt character tracts thang form 950 PF in law of Form 1941 - Check here and settle the amount of trave-entity interest received or accreded during the year and settle the amount of trave-entity interest received or accreded during the year and settle the amount of trave-entity interest received or accreded during the year and settle the amount of trave-entity interest received an accreded during the year of the reactions for exceptions and filing requirements for indical Form 114. If Yes, 'enter the name of the foreign country in Phenomena in a foreign country. 15 N/A 16 In Yes No Statements Regarding Activities for Which Form 1472 May Be Required 16 File Form 4720 d any tens in chacked in the "Yes" column, unless an exception applies. 16 Derive when the seal or exchange, or lessing of roperfly with a disqualided person? 17 See the estimation of the second of the directly or indirectly! 18 Figure in the seal or exchange, or lessing of roperfly with a disqualided person? 19 Figure in the seal or exchange, or lessing of roperfly with a disqualided person? 19 Figure in the seal or exchange or lessing of roperfly with a disqualided person? 19 Figure in the seal or exchange or lessing of roperfly with a disqualided person? 19 Figure in the seal or exchange or lessing of roperfly with a disqualided person? 19 Figure in the seal or exchange or lessing of roperfly with a disqualided person? 19 Figure in the seal or less of the seal	Pa	art VII-A Statements Regarding Activities (continued)		_	
section 512(b) (13)? If If vest, attach schedules ges instructions) 10 of the foundation make a distribution to a donine advised fund over which the foundation or a disqualified person had advisory grivileges? If Yes, attach statement (see instructions) 10 of the foundation comply with the public inspection requirements for its aneual returns and overption application? Website address > N/A 11 The books are in care of PTHE FELDBERG OFFICE Telephone (i.o. \$\sqrt{500}\$ \) 390 - 231 & \text{Located at } > P \ O . BOX 9175, FRAMTNORIAM, MA 21P-4 > 101701 15 Section 4947(a)(1) noneampt charitable trusts filing Form 890-FF in also of Form 141-Check here and either the anount of lax-exempts interest received or accrued during the year 16 At any time disripation and anount of 12 secential interest received or accrued during the year 17 And the disripation of the received interest received or accrued during the year 18 At any time disripation of the received interest received or accrued during the year 19 And yilling and the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a 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. 19 And the property of the foundation have an interest in the accrued to the property of the foundation of the country of the foundation of the section of the country of the foundation of the section of the country of the foundation of the section of the country of the foundation of the section of t	_			Yes	No
12 Did the foundation make a distribution to a dioner advised fund over which the foundation or a disqualified person had advisory privileges? 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Withose address ► N/A 11 The books are not or to ► THE FELDBERG OFFICE Located at ►P. O. BOX 9175, FRAMTNORIAM, MA 12 P4 ▶ 01701 15 Section 4987(01) nonexempt charable trusts filing from 950-PF in less of Form 1041 - Check here and enter the amount of tax-ewropt interest received or accrued during the year A had you from unquired activity are 2016, did the foundation have an interest or a signature or other authority over a bank, securities, or other financial account in a freeging country? See the instructions for occeptiones and fring requirements for PriDCEN Form 114, If Y'cs, enter the name of the foreign country Pert VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 far my item is checked in the "Yes" column, unless an exception applies. 1a During the year did the foundation (either directly): 1b Engage in the sale or exchange, or lessing of progressly with a disqualified person? 2c) Borrow money from, land money to, or otherwise setted credit to (or accept it from) a disqualided person? 3 Furnish goods, services, or tracities to (or accept them from) a disqualided person? 4 Pear or my or or my or or remitures the expenses of, a disqualided person? 4 Pear or my or or assets to a desqualided person? 5 Transfer any income or assets to a desqualided person (or make any or either available) 6 Agree to pay money or property to a government official for a period after termisation or government service. If terminating within 90 days.) 8 If I any answers or Yes' to large year any or the accept them from the properties of the foundation and page in any or year any or the acception described in is, other than excepted acist, that were not corrected before the list day of the tax year beginning in 201	11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of			
If "Res,' traich stetement (see instructions) 12		section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		Х
18	12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?			
Whoste address N/A 14 The books are in care of THE FELDBERG OFFICE Telephone no. (50.8) 390-2318 Located at P-O. BOX 9175, FRAMINGHAM, MA 72/P4 > 01701 15 Section 4947(a)(1) nonexempt charitable trusts fitting form 950-PF in lisu of Form 1041-Check here and enter the mount of lax-exempt interest reversely on accrued during the year 15 N/A 16 At any time during celenate year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and fitting requirements for FinCEN Form 114. If Yes, enter the name of the foreign country Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any Item is checked in the "Yes" column, unless an exception applies. 18 During the year of the foundation (lettle directly or ordinacity): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes X No (2) Borrow morely from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? Yes X No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No (4) Pay compensation to, or pay or remitivuse the expenses of, a disqualified person? Yes X No (5) Transfer any momen or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either av		If "Yes," attach statement (see instructions)	12		Х
14 The books are in care of ▶ THE FELDBERG OFFICE Telephone no ▶ (508) 390-2318 Located at № P.O. BOX 9175, FRANINGHAM, MA 15 Section 4947(a)(1) nonexempt charitable trusts thing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year At any time during clainedy set 2016, did the frondation have an interest in or a signature or other authority over a bank, securities, or other financeal account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114, it Yes, enter the name of the foreign country. Pert VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 framy item is checked in the "Yes" column, unless an exception applies. 1 a During the year off the toundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, land money to, or otherwise extend credit to (or accept in from) a disqualified person? (3) Firmish goods, services, or facilities to (or accept them from) a dequalified person? (3) Firmish goods, services, or facilities to (or accept them from) a dequalified person? (3) Firmish goods, services, or facilities to (or accept them from) a dequalified person? (3) Firmish goods, services, or facilities to (or accept them from) a dequalified person? (3) Firmish goods, services, or facilities to (or accept them from) a dequalified person? (3) Firmish goods, services, or facilities to (or accept them from) a dequalified person? (3) Firmish goods, services, or facilities to (or accept them from) a dequalified person? (3) Firmish goods, services, or facilities to (or accept them from) a dequalified person? (3) Firmish goods, services, or facilities to (or accept them from) a dequalified person? (3) Firmish goods, services, or facilities to (or accept them from) a dequalified person? (3) Firmish goods, services, or facilities to (or accept them from) a	13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	_
Located at ▶ P.O. BOX 9175, FRAMINGHAM, MA 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 acrued dump the year 18. At any time during calendary year 2016, did the foundation have an interest in or a signature or other asthority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114, it "Yes," enter the name of the foreign country. ▶ Port 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 desqualited person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept if from) a disqualified person? Yes X No					
Located al ▶ P.O. BOX 91.75, FRAMINGHAM, MA Section 49.7(a)1 nonexempt charateble trusts than growing form 980-PF in the surf Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year 16. At any time during celebratory are 2016, did the foundation have an interest in or a signature or other authority over a bank, secure 15. N/A 17. N/A 18. At any time during celebratory are 2016, did the foundation foundation for the manual cause of the financial scale or other insancial scale out in a foreign country? See the instructions for exceptions and fining requirements for FiniCEN Form 114. If Yes, enter the name of the foreign country. Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any frem is checked in the "Yes" column, unless an exception applies. 1	14			-23	18
and enter the amount of the exempt interest received or accrued during the year A any time during calendar year 2015, did the foundation have an interest in or a signature or other authority over a bank, See the instructions for exceptions and thing requirements for FinCEN Form 114. If Yes, enter the name of the foreign country ▶ Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any titem 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 dequalified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept them) a disqualified person? Yes X No (3) Furnish poods, services, or facilities to (or accept them from) a disqualified person? Yes X No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes X No (5) Transfer any income or assets to a dequalified person (or make any of either avaitable for the benefit or use of a desqualified person (file X X No (6) Agree to pay money or property to a povernment official? (Exception, Check No If the foundation argend to make a grant to or to employ the official for a penied after termination of government service, if terminating within 90 days.) If all the property of the acts that the qualify under the exceptions described in Regulations section 5x.941 ((f)-G) of an argority of the acts discribed in 1a, other than excepted acts, that were not corrected before the first day of the tax year polymoning disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? The end of tax year 2016, did the foundation have any un		Located at ▶ P.O. BOX 9175, FRAMINGHAM, MA ZIP+4 ▶0.	L701		
16 A lary time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financel account in a foreign country? See the instructions for exceptions and fitting requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country. Part VI-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 of 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 lessing of property with a disqualified person? (2) Borrow money from, tend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any incine or assets to a disqualified person (or make any of either available to the benefit or use of a disqualified person)? (6) Agree to pay money or primptive to givernment official? (Exception, Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) b If any answer is "vis" to 14(1)-(6), did any of the acts fail to quality under the exceptions described in Regulations section 53.491 (ig/13) or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? It is the foundation organ and provide in	15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here		•	\Box
securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FiNCEN Form 114, if "Yes," enter the name of the foreign country. Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a During the year did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them firom) a disqualified person? (4) Pay compensation to, or pay or reimburs the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception, Check 'No' if the foundation agreed to make a grain to or to employ the official for a period after termination of government service, if terminating within 90 days.) b) If any answer is "Yes" to 1a(1)-(6), did any of the acts fall to qualify under the exceptions described in Regulations section 53.494 I(d)-3 or in a current notice regarding disaster assistance (see instructions)? C Did the foundation engage in a prior year in any of the acts fall to qualify under the exceptions described and Regulations exception applies of the search of the compage in a prior year in any of the acts fall to qualify under the exceptions described in Regulations and the did the foundation in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016? 2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(a)(2) or the year		and enter the amount of tax-exempt interest received or accrued during the year	N		
See the nistructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 ff any item is checked in the "Yes" column, unless an exception applies. 1a During the year of did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or remibures the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person) make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person) make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person) make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) b If any answer is "Ses" to Tajl." (-)(-), (di di any of the acts fail to quality under the exceptions described in Regulations section 53.4941(n)-3 or in a current notice regarding disaster assistance (see instructions)? D/A a 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 sldy of the tax year. To a fail the foundation make any ye	16	At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank,		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); 1) Engage in the sale or exchange, or leasing of property with a disqualified person?		securities, or other financial account in a foreign country?	16		_X
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1 a During the year did the foundation (either directly or indirectly); (1) Engages in the sale or exchange, or leasing of property with a disqualified person? (2) Borriow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the paymony of property to a pownern or property to a powner or make any of either available for the paymony of the act sal to qualify under the exceptions described in Regulations section 4942(a)(3) or 49		See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the	1		
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a During the year did the foundation (either directly) or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) b if any answer is "Yes" to 1a(1)-(6), did any of the acts fall to qualify under the exceptions described in Regulations section 53.494 ((i)-3 or in a current notice regarding disaster assistance (see instructions)? C Did the foundation engage in a prior year in any of the acts fall to qualify under the exceptions described in Regulations section 54.941 ((i)-3 or in a current notice regarding disaster assistance check here C Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016? 2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942((i)(i)) or 4942((i)(i)): a At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? If Yes, "ist the years is sticd 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 u	_				L
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defined in section 4942(j)(3) or 4942(j)(5)): a At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? If "Yes," list the years b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (if applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	_		10		
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b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	•				ĺ
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statement - see instructions.) c if the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.]		,
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Form 4720, to determine if the foundation had excess business holdings in 2016) 1 A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 2 A 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? 3 B X					
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a X 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 X			3ь		1
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had not been removed from jeopardy before the first day of the tax year beginning in 2016?					\vdash
	_		_4b		X
			rm 99 0)-PF	(2016)

623551 11-23-16

Total number of other employees paid over \$50,000

Part VIII Information About Officers, Directors, Trustees, Foundat Paid Employees, and Contractors (continued)	ion Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, enter	"NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
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 statistic number of organizations and other beneficiaries served, conferences convened, research papers product. N/A	cal information such as the iced, etc.	Expenses
N/A		
2		
3		· · · · · ·
4		
Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on live.	nes 1 and 2.	Amount
1 N/A		
2		
All other program-related investments. See instructions.		
3		
Total. Add lines 1 through 3		0.
Total Add lines I tillough a		Form 990-PF (2016)

Part X | Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.) Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: 5,814,078. a Average monthly fair market value of securities 47,058. 16 b Average of monthly cash balances 1c c Fair market value of all other assets 5,861,136. 10 d Total (add lines 1a, b, and c) e Reduction claimed for blockage or other factors reported on lines 1a and 0. 1e 1c (attach detailed explanation) Acquisition indebtedness applicable to line 1 assets 5,861,136. 3 Subtract line 2 from line 1d 87,917. Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) 4 773,219 5 Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4 288,661 Minimum investment return Enter 5% of line 5 Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain and do not complete this part.) foreign organizations check here Minimum investment return from Part X, line 6 288,661. 4,025. 2a Tax on investment income for 2016 from Part VI, line 5 2a 2b Income tax for 2016. (This does not include the tax from Part VI.) 4,025 Add lines 2a and 2b 2c 3 Distributable amount before adjustments Subtract line 2c from line 1 4 Recoveries of amounts treated as qualifying distributions 284, 636. Add lines 3 and 4 5 0. Deduction from distributable amount (see instructions) 6 284. Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 7 636. Part XII Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: 325,000. a Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 1a 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 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 325,000. Qualifying distributions Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 4 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment 4,025. income. Enter 1% of Part I, line 27b 320.975.Adjusted qualifying distributions. Subtract line 5 from line 4 6 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

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4940(e) reduction of tax in those years

CHARITABLE TRUST

(a) (b) (c) (d) Corpus Years prior to 2015 2015 2016	
1 Distributable amount for 2016 from Part XI,	
	,636.
2 Undistributed income, if any, as of the end of 2016	
a Enter amount for 2015 only 274, 605.	
b Total for prior years:	
0.	
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: ►\$ 325,000.	
a Applied to 2015, but not more than line 2a 274,605.	
b Applied to undistributed income of prior	
years (Election required - see instructions)	
c Treated as distributions out of corpus	
(Election required - see instructions)	
	,395.
e Remaining amount distributed out of corpus	,,355.
	0.
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;	
â 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 0.	
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 instr.	
f Undistributed income for 2016. Subtract	
lines 4d and 5 from line 1. This amount must	
be distributed in 2017	1,241.
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	
9 Excess distributions carryover to 2017.	
Subtract lines 7 and 8 from line 6a 0.	
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	

SHIRLEY & MILTON LEVY FAMILY CHARITABLE TRUST 22-6480716 Form 990-PF (2016) Page 10 Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) N/A 1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2016, enter the date of the ruling b Check box to indicate whether the foundation is a private operating foundation described in section 4942(j)(3) or 4942(j)(5) Prior 3 years Tax year 2 a Enter the lesser of the adjusted net (e) Total (a) 2016 (b) 2015 (c) 2014 (d) 2013 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 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 c "Support" alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(III) (3) Largest amount of support from an exempt organization (4) Gross investment income Part XV | Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.) 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).) NONE 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 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here X if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d. a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed: b The form in which applications should be submitted and information and materials they should include:

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c Any submission deadlines:

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

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	Purpose of grant or contribution	Amount
	or substantial contributor	recipient		
Paid during the year				
			1	
•		1	ACCORDED TAX EXEMPT	
			STATUS UNDER	325,000.
				-
		Ì	1	
		1	IRC SECTION 501	
•		}	(C)(3).	
		 	(6/(3/.	
•		501(C)3	CONTRIBUTIONS TO ALL	
			RECIPIENTS WERE MADE	
		 	TO FURTHER	
SEE ATTACHED			THE ACTIVITIES AND	
			PROGRAMS FOR WHICH	
			THEY WERE	
			1	
			1	
Total		<u> </u>	▶ 3a	325,000.
b Approved for future payment				
NONE		ĺ	1	
				· ·
		ĺ	1	
		 	 	
		1		
		<u> </u>		
Total			▶ 3b	0.

Form 990-PF (2016) Part XVI-A

CHARITABLE TRUST

Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelate	ed business income		ed by section 512, 513, or 514	(e)
1 Program service revenue:	(a) Business code	(b) Amount	Exclu- sion code	(d) Amount	Related or exempt function income
a			 		
			╁		
b		<u></u>	1 1		
			1 1		
d		<u> </u>	╁		
f			╁		
g Fees and contracts from government agencies		· -	1 +		
2 Membership dues and assessments			╁┈┼		
3 Interest on savings and temporary cash			╁╌╾╁		
investments			14		
4 Dividends and interest from securities		<u> </u>	14	74,637.	
5 Net rental income or (loss) from real estate:			╁╼╫	7270071	
a Debt-financed property			 		
b Not debt-financed property			+ +		
6 Net rental income or (loss) from personal			╅		
property					
7 Other investment income	<u> </u>		14	1,300.	
8 Gain or (loss) from sales of assets other		· 	1 - 1		
than inventory			18	330,928.	
9 Net income or (loss) from special events		·	+ - 4	330,3201	
10 Gross profit or (loss) from sales of inventory			╁─┼		
11 Other revenue:		· -	╁╼╾╁		
•]		1 1	j	
<u> </u>			† †		
			1		
d			╁		
e			++		
12 Subtotal. Add columns (b), (d), and (e)		0.		406,865.	0.
13 Total Add line 12, columns (b), (d), and (e)			1 1	13	406,865.
(See worksheet in line 13 instructions to verify calculations.)				··-	
Part XVI-B Relationship of Activities to Line No. Explain below how each activity for which income					lighment of
the foundation's exempt purposes (other than b					
		-			
823621 11-23-16					Form 990-PF (2016)

	TABLE TRUST		22-64			ige 13
Part XVII Information Re Exempt Organ		ers to and transactions	and Relationships With Nonch	aritable	е	
Did the organization directly or indir		he following with any other organiza	tion described in section 501(c) of	$\overline{}$	Yes	No
		section 527, relating to political org]		
a Transfers from the reporting found	ation to a noncharitable	exempt organization of:		ļ]	l
(1) Cash				1a(1)		X
(2) Other assets				1a(2)		X
b Other transactions:				1,		
(1) Sales of assets to a noncharital	· -		-	1b(1)	 	X
(2) Purchases of assets from a nor		Inization	•	1b(2)	 -	X
(3) Rental of facilities, equipment,(4) Reimbursement arrangements			•	1b(3) 1b(4)		X
(5) Loans or loan guarantees			-	16(5)		X
(6) Performance of services or me	mbership or fundraising	solicitations	•	1b(6)		X
c Sharing of facilities, equipment, ma				10		X
d If the answer to any of the above is	"Yes," complete the folio	owing schedule. Column (b) should	always show the fair market value of the good	s, other as:	sets,	
or services given by the reporting for	oundation. If the foundat	tion received less than fair market va	alue in any transaction or sharing arrangemen	t, show in		
column (d) the value of the goods,						
(a) Line no (b) Amount involved	(c) Name of no	ncharitable exempt organization	(d) Description of transfers, transactions, a	nd sharing ar	rangeme	nts
	<u> </u>	N/A				
	 		 			
	 					
	 		- 			
	 					
			· 			
						
	 					
	 					
2a Is the foundation directly or indirect	the affiliated with for rela-	ted to one or more tay-evernt orga	unizations described			
in section 501(c) of the Code (other	•		mizations described	Yes	X] No
b If "Yes," complete the following sch) or in occion of ,				
(a) Name of org		(b) Type of organization	(c) Description of relation	nship		
N/A						
			_			
						
Linder peralties of perany (declare	that I have exemined this re'	turo, including accompanying schedules a	nd statements, and to the best of my knowledge			
			ormation of which preparer has any knowledge.	May the IRS return with the	ne prepai	rer
Here	7/	18/15/17	Truster	shown below		" ☐ No
Signature of officer or trustee	,	Date	Title			
Print/Type preparer's na		reparer's signature	Date Check if PTI	N -		
//	1	of with	self- employed			
Paid // JAY WEBBER	<u> </u>	gy war		00316		
Preparer Firm's name ► CBI	Z TOFIAS		Firm's EIN ► 26-	37531	34	
Use Only						
Firm's address ► 50	0 BOYLSTON	STREET				

BOSTON, MA 02116

Phone no. 617-761-0600

FORM 990-PF	DIVIDENDS	S AND INTER	REST FROM SE	CURITIES	Sī	ratement	1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENI	REVENU		VEST-	(C) ADJUSTI NET INCO	
QUANTITATIVE FUNDS	37,905 57,329		97. 17,3 0. 57,3		,308.		
TO PART I, LINE 4	95,234	20,59	74,6	37. 74	,637.		
FORM 990-PF		OTHER I	NCOME		Si	TATEMENT	2
DESCRIPTION			(A) REVENUE PER BOOKS	(B) NET INVE MENT INC		(C) ADJUSTEI NET INCOI	
OTHER INCOME			1,300	•	0.		
TOTAL TO FORM 990-PI	F, PART I,	LINE 11	1,300	· -	0.		
FORM 990-PF		ACCOUNTI	ING FEES		S'	TATEMENT	3
DESCRIPTION		(A) EXPENSES PER BOOKS	(B) NET INVEST MENT INCOM		TED	(D) CHARITAI PURPOSI	
CBIZ TOFIAS		1,250.	1,25	0.			0.
TO FORM 990-PF, PG	1, LN 16B	1,250.	1,25	0.			0.
FORM 990-PF		ΤΑΣ	KES		Si	TATEMENT	4
DESCRIPTION		(A) EXPENSES PER BOOKS	(B) NET INVEST MENT INCOM		TED	(D) CHARITAI PURPOSI	
COMMONWEALTH OF MASS US TREASURY FOREIGN TAX	S	35. 7,096. 1,814.	•	5. 0. 4.	-		0. 0. 0.
TO FORM 990-PF, PG	1, LN 18	8,945.	1,84	9.			0.
				======			

FORM 990-PF	CORPORATE S	STOCK	STATEMENT 5
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
TJX COMPANIES		1,726.	4,050,108.
TOTAL TO FORM 990-PF, PART II,	LINE 10B	1,726.	4,050,108.
FORM 990-PF	OTHER INVEST	TMENTS	STATEMENT 6
DESCRIPTION	VALUA METI	ATION HOD BOOK VALUE	FAIR MARKET VALUE
DESCRIPTION QUANTITATIVE INC. INVESTMENTS		HOD BOOK VALUE	VALUE

SHIRLEY & MILTON LEVY FAMILY CHARITABLE - CONTRIBUTIONS EIN: 22-6480716

AMERICAN CIVIL LIBERTIES UNION AMERICAN JEWISH COMMITTEE - IN HONOR OF STEVEN LEVY BENJAMIN M BANKS MD FELLOWSHIP IN GASTROENTEROLOGY B'NAI B'RITH - ANTI DEFAMATION LEAGUE BRANDEIS UNIVERSITY DANA FARBER CANCER INSTITUTE EQUAL JUSTICE INITIATIVE FACING HISTORY AND OURSELVES-IN HONOR OF THE WORK OF JARED HADASSAH ANGEL OF MERCY HARVARD COLLEGE FUND-MEMORIAL GIFT HEBREW SENIORLIFE (FORMERLY REHAB) HOSPICE FOUNDATION OF PALM BEACH COUNTY JEWISH FEDERATION OF PALM BEACH JEWISH FAMILY & CHILDREN'S SERVICES-IN HONOR OF JOHN LEVY JFCS OF COLLIER COUNTY KRAVIS CENTER MIAMI CITY BALLET MORSE GERIATRIC CENTER NARAL PROCHOICE AMERICA NEW CENTER OF ART AND CULTURE NORTON MUSEUM OF ART PALM BEACH COMMUNITY CHEST PALM BEACH DRAMA WORKS SIMMONS COLLEGE - SCHOOL OF SOCIAL WORK SMITH COLLEGE ALUMNAE FUND SOCIETY OF THE FOUR ARTS SOUTHERN POVERTY LAW CENTER TECHNION UNITED WAY OF PALM BEACH COUNTY	2016 30,000 00 10,000.00 20,000 00 30,000 00 5,000.00 1,000 00 20,000 00 2,000.00 20,000 00 5,000 00 5,000 00 5,000 00 2,000.00 1,000.00 2,000 00 1,000 00 2,000 00 1,000 00 2,000 00 1,000 00 2,000 00 1,000 00 2,000 00 1,000 00 2,000 00 1,000 00 2,000 00
SOUTHERN POVERTY LAW CENTER	10,000 00
US HOLOCAUST MEMORIAL MUSEUM	10,000.00
WASHINGTON INSTITUTE FOR NEAR EAST STUDY	10,000.00

325,000 00

GRAND TOTAL