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

Name of foundation CROWELL FAMILY FOUNDATION 7522-07552000058		A Employer identification number 32-6011964	
Number and street (or P O box number if mail is not delivered to street address) 45 SCHOOL ST 5TH FLOOR		B Telephone number (see instructions) (617) 523-1635	
City or town, state or province, country, and ZIP or foreign postal code BOSTON, MA 021083204		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <div><input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change</div> <div><input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change</div>		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 1,099,917	J Accounting method <input type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	24,061	22,044		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	52,753			
	b Gross sales price for all assets on line 6a _____ 160,929				
	7 Capital gain net income (from Part IV, line 2)		52,753		
	8 Net short-term capital gain			0	
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	76,814	74,797		
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages		0	0	0
	15 Pension plans, employee benefits		0	0	
	16a Legal fees (attach schedule)				0
	b Accounting fees (attach schedule)	2,200	2,200	0	0
	c Other professional fees (attach schedule)	5,976	5,976		0
	17 Interest				0
	18 Taxes (attach schedule) (see instructions)	1,569			0
	19 Depreciation (attach schedule) and depletion	0	0		
	20 Occupancy				
	21 Travel, conferences, and meetings		0	0	
	22 Printing and publications		0	0	
	23 Other expenses (attach schedule)	75			
	24 Total operating and administrative expenses. Add lines 13 through 23	9,820	8,176	0	0
	25 Contributions, gifts, grants paid	51,780			51,780
	26 Total expenses and disbursements. Add lines 24 and 25	61,600	8,176	0	51,780
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	15,214			
	b Net investment income (if negative, enter -0-)		66,621		
c Adjusted net income (if negative, enter -0-)				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	12,167	82,615	82,615	
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____		0	0	
	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 ▶ _____ 0				
	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)	670,948	615,597	969,713	
	c	Investments—corporate bonds (attach schedule)				
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____				
	12	Investments—mortgage loans				
	13	Investments—other (attach schedule)	64,690	64,807	47,589	
	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)	747,805	763,019	1,099,917		
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable.				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule).				
	22	Other liabilities (describe ▶ _____)				
	23	Total liabilities (add lines 17 through 22)		0		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds	747,805	763,019		
	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)	747,805	763,019		
31	Total liabilities and net assets/fund balances (see instructions) .	747,805	763,019			

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	747,805
2	Enter amount from Part I, line 27a	2	15,214
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	763,019
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	763,019

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	52,753
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	54,555	1,126,434	0 048432
2014	16,650	1,116,391	0 014914
2013	45,700	1,118,715	0 04085
2012	33,635	906,104	0 03712
2011	42,279	891,400	0 04743
2 Total of line 1, column (d)			2 0 188746
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 037749
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5			4 1,069,413
5 Multiply line 4 by line 3			5 40,369
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 666
7 Add lines 5 and 6			7 41,035
8 Enter qualifying distributions from Part XII, line 4			8 51,780

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	666
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	666
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	666
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	550
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	800
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	1,350
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	0
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	684
11	Enter the amount of line 10 to be Credited to 2017 estimated tax ▶ 684 Refunded ▶	11	0

Part VII-A Statements Regarding Activities

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

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ►	13	Yes	
14	The books are in care of ► <u>THOMAS W CROWELL</u> Telephone no ► <u>(415) 456-6753</u>			

Located at ► 66 BENNITT AVENUE SAN ANSELMO CA ZIP+4 ► 94960

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here	<input type="checkbox"/>		
	and enter the amount of tax-exempt interest received or accrued during the year	► 15		
16	At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	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)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days).	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	<input type="checkbox"/>	1b	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016?		1c	No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	If "Yes," list the years ► 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).		2b	No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016).		3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a	No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2016?		4b	No

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

5a During the year did the foundation pay or incur any amount to (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Provide a grant to an individual for travel, study, or other similar purposes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No b If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	5b		
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? <input type="checkbox"/> Yes <input type="checkbox"/> No <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</i>			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <i>If "Yes" to 6b, file Form 8870</i>	6b		No
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	7b		

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
CHARLES P CURTIS WELCH FORBES LLC 45 SCHOOL ST BOSTON, MA 02145	TRUSTEE 1	0		
THOMAS W CROWELL 66 BENNETT AVENUE SAN ANSELMO, CA 94960	TRUSTEE 1	0		
DEBORAH W CROWELL 2276 EAST GOSS CIRCLE BOULDER, CO 80302	TRUSTEE 1	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 N/A	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3 ▶	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	1,004,563
b	Average of monthly cash balances.	1b	81,135
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	1,085,698
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	1,085,698
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	16,285
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	1,069,413
6	Minimum investment return. Enter 5% of line 5.	6	53,471

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	53,471
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	666
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	666
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	52,805
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	52,805
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	52,805

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	51,780
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	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	51,780
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	666
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	51,114

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				52,805
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only.			51,274	
b Total for prior years 2014, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2016				
a From 2011. 0				
b From 2012. 0				
c From 2013. 0				
d From 2014. 0				
e From 2015. 0				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ 51,780				
a Applied to 2015, but not more than line 2a			51,274	
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.				506
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a))	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
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				52,299
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).	0			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2012. 0				
b Excess from 2013. 0				
c Excess from 2014. 0				
d Excess from 2015. 0				
e Excess from 2016. 0				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2016, enter the date of the ruling. ▶

b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

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

Part XV Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))
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

◀ | ▶

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
THOMAS W CROWELL
66 BENNETT AVENUE
SAN ANSELMO, CA 94960
(415) 456-6753

b The form in which applications should be submitted and information and materials they should include
TRUSTEES WILL RESEARCH AND ANALYZE POSSIBLE RECIPIENTS OF CONTRIBUTIONS-OTHERWISE NO SET FORMAT ESTABLISHED

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
SUBJECT TO REVIEW & APPROVAL BY TRUSTEES

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> See Additional Data Table				
Total			▶ 3a	51,780
b <i>Approved for future payment</i>				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities. . . .			14	24,061	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	52,753	
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). .				76,814	

13 Total. Add line 12, columns (b), (d), and (e). **13** 76,814
(See worksheet in line 13 instructions to verify calculations.)

[illegible]

Part XVII

- | | Yes | No |
|-------|-----|----|
| 1a(1) | | No |
| 1a(2) | | No |
| 1b(1) | | No |
| 1b(2) | | No |
| 1b(3) | | No |
| 1b(4) | | No |
| 1b(5) | | No |
| 1b(6) | | No |
| 1c | | No |

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

- b** If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

**Sign
Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

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

**Paid
Preparer
Use Only**

Print/Type preparer's name WAYNE R KURPIEL	Preparer's Signature	Date 2017-05-25	Check if self-employed <input type="checkbox"/>	PTIN P00107798
Firm's name ► WELCH & FORBES LLC				Firm's EIN ► 04-3573806
Firm's address ► 45 SCHOOL STREET BOSTON, MA 021083204				Phone no (617) 523-1635

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)
1000 BANK OF AMERICA CORPORATION		2015-01-15	2016-11-17
250 FORTIVE CORP COM		2010-09-01	2016-07-18
300 JOHNSON & JOHNSON		2010-09-01	2016-04-01
500 JOHNSON CTLS INC		2010-09-01	2016-09-06
500 METLIFE INC		2011-08-03	2016-08-19
75 PEPSICO INC		2006-11-14	2016-04-18
6 RMR GROUP INC CL A		2015-12-15	2016-01-05
400 SUNCOR ENERGY INC		2010-09-01	2016-05-03
800 U S SILICA HLDGS INC COM		2015-01-22	2016-06-13
200 U S SILICA HLDGS INC COM		2015-07-29	2016-06-13

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

(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)
19,950		15,540	4,410
12,699		4,665	8,034
32,322		9,546	22,776
21,956		13,920	8,036
20,262		19,430	832
7,774		4,616	3,158
8		7	1
10,976		12,697	-1,721
26,032		20,827	5,205
6,508		4,946	1,562

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			(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	
			4,410
			8,034
			22,776
			8,036
			832
			3,158
			1
			-1,721
			5,205
			1,562

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)
7 ADIENT PLC ORD SHS		2016-11-01	2016-11-17
41 ADIENT PLC ORD SHS		2016-11-01	2016-12-09
85 JOHNSON CTLS INTL PLC SHS		2016-09-06	2016-09-15

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

(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)
31		33	-2
2,372		1,910	462
39		39	

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			(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	
			-2
			462

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
AMERICAN RED CROSS 444 SHERMAN STREET DENVER, CO 80203	N/A	PUBLIC CHARITY	GENERAL FUND, FLOOD RELIEF	2,000
AMERICAN CANCER SOCIETY PO BOX 5280 MANCHESTER, NH 03108	N/A	PUBLIC CHARITY	GENERAL FUND	100
TOWN OF CANAAN PO BOX 38 CANAAN, NH 03741	N/A	PUBLIC CHARITY	GENERAL FUND	100
DARTMOUTH HITCHCOCK ANNUAL FUND 1 MEDICAL CENTER DRIVE LEBANON, NH 03756	N/A	PUBLIC CHARITY	GENERAL FUND	700
DOCTORS WITHOUT BORDERS 333 7TH AVENUE NEW YORK, NY 10001	N/A	PUBLIC CHARITY	GENERAL FUND	500
GRAFTON FIREFIGHTERS ASSOCIATIONS PO BOX 191 GRAFTON, VT 05145	N/A	PUBLIC CHARITY	GENERAL FUND	100
NH ASSOCIATION FOR THE BLIND 25 WALKER STREET CONCORD, NH 03301	N/A	PUBLIC CHARITY	GENERAL FUND	400
NEW HAMPSHIRE PUBLIC RADIO 2 PILLSBURY STREET CONCORD, NH 03301	N/A	PUBLIC CHARITY	GENERAL FUND	150
NORTHERN STAGE 12 W MAIN STREET WHITE RIVER JUNCTION, VT 05001	N/A	PUBLIC CHARITY	GENERAL SUPPORT	450
SOCIETY FOR THE PROTECTION OF NH FORESTS 54 PORTSMOUTH STREET CONCORD, NH 03301	N/A	PUBLIC CHARITY	GENERAL FUND	100
UPPER VALLEY LAND TRUST 19 BUCK STREET HANOVER, NH 03755	N/A	PUBLIC CHARITY	GENERAL SUPPORT	100
VERMONT PUBLIC RADIO 365 TROY AVENUE COLCHESTER, VT 05446	N/A	PUBLIC CHARITY	GENERAL FUND	200
VERMONT PUBLIC TELEVISION 204 ETHAN ALLEN AVENUE COLCHESTER, VT 05446	N/A	PUBLIC CHARITY	GENERAL FUND	60
FREIGHT & SALVAGE 2020 ADDISON STREET BERKELEY, CA 94704	N/A	PUBLIC CHARITY	GENERAL FUND	300
MARIN MUSEUM OF BICYCLING PO BOX 875 KENTFIELD, CA 94914	N/A	PUBLIC CHARITY	GENERAL FUND	200
Total ► 3a				51,780

Form 990FP Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ONE SCHOOL AT A TIME PO BOX 342 ELDORADO SPRINGS, CO 80025	N/A	PUBLIC CHARITY	GENERAL FUND	250
350ORG 20 JAY STREET SUITE 1010 BROOKLYN, NY 11201	N/A	PUBLIC CHARITY	GENERAL FUND	500
ALICE PECK DAY INTERNATIONAL MEMORIAL HOSPITAL 125 MASCOMA STREET LEBANON, NH 03766	N/A	PUBLIC CHARITY	GENERAL FUND	500
ALZHEIMER'S ASSOCIATION 225 N MICHIGAN AVENUE CHICAGO, IL 60601	N/A	PUBLIC CHARITY	GENERAL FUND	500
AMERICAN CIVIL LIBERTIES UNION 125 BROAD STREET 18TH FLOOR NEW YORK, NY 10004	N/A	PUBLIC CHARTY	GENERAL FUND	500
BROOKS SCHOOL 1160 GREAT POND ROAD NORTH ANDOVER, MA 01845	N/A	PUBLIC CHARITY	GENERAL FUND	1,000
BUILDING BAJA'S FUTURE 1825 PONCE DE LEON BLVD SUITE 302 CORAL GABLES, FL 33134	N/A	PUBLIC CHARITY	GENERAL FUND	1,000
CANAAN FAST SQUAD PO BOX 35 CANAAN, NH 03741	N/A	PUBLIC CHARITY	GENERAL FUND	100
CENTER FOR RESOURCE CONSERVATION 2639 SPRUCE STREET BOULDER, CO 80302	N/A	PUBLIC CHARITY	GENERAL FUND	250
COLORADO AVALANCHE INFORMATION CENTER 325 BROADWAY WSI BOULDER, CO 80305	N/A	PUBLIC CHARITY	GENERAL FUND	250
COMMUNITY CYCLES 2805 WILDERNESS PLACE SUITE 1000 BOULDER, CO 80301	N/A	PUBLIC CHARITY	GENERAL FUND	250
D ACRES OF NEW HAMPSHIRE PO BOX 98 DORCHESTER, NH 03266	N/A	PUBLIC CHARITY	GENERAL FUND	150
DISABLED AMERICAN VETRANS PO BOX 14301 CINCINNATI, OH 45250	N/A	PUBLIC CHARITY	GENERAL FUND	400
EARTHJUSTICE 50 CALIFORNIA STREET SAN FRANCISCO, CA 94111	N/A	PUBLIC CHARITY	GENERAL FUND	300
ECO CYCLE 5030 PEARL STREET BOULDER, CO 80301	N/A	PUBLIC CHARITY	GENERAL FUND	500
Total ►				51,780
3a				

Form 990FP Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
EMERGENCY FAMILY ASSISTANCE ASSOC 1575 YARMOUTH BOULDER, CO 80304	N/A	PUBLIC CHARITY	GENERAL FUND	500
ENFIELD SHAKER MUSEUM 447 NH ROUTE 4A ENFIELD, NH 03748	N/A	PUBLIC CHARITY	GENERAL FUND	100
GRAFTON CARES PO BOX 134 GRAFTON, VT 05146	N/A	PUBLIC CHARITY	GENERAL FUND	1,000
GRAFTON RESCUE SQUAD PO BOX 54 GRAFTON, VT 05146	N/A	PUBLIC CHARITY	GENERAL FUND	100
GRAFTON COUNTY SENIOR CITIZENS PO BOX 433 LEBANON, NH 03766	N/A	PUBLIC CHARITY	GENERAL FUND	150
HABITAT FOR HUMANITY 322 W LAMAR STREET AMERICUS, GA 31709	N/A	PUBLIC CHARITY	GENERAL FUND	500
HANOVER CONSERVANCY 16 BUCK ROAD HANOVER, NH 03755	N/A	PUBLIC CHARITY	GENERAL FUND	200
HEIFER FOUNDATION 1 WORLD AVENUE LITTLE ROCK, AR 72202	N/A	PUBLIC CHARITY	GENERAL FUND	800
INTERNATIONAL COMMUNITY FOUNDATION 2505 N AVENUE NATIONAL CITY, CA 91950	N/A	PUBLIC CHARITY	LIGA MAC FUND HURRICANE	500
KENDALL AT HANOVER 80 LYME ROAD HANOVER, NH 03755	N/A	PUBLIC CHARITY	GENERAL OPERATING FUND	750
KNEISEL HALL PO BOX 648 BLUE HILL, ME 04614	N/A	PUBLIC CHARITY	GENERAL FUND	600
MARIN LIERACY PROGRAM 1100 E STREET SAN RAFAEL, CA 94901	N/A	PUBLIC CHARITY	GENERAL FUND	600
NEW ENGLAND WILDFLOWER SOCIETY 180 HEMENWAY ROAD FRAMINGHAM, MA 01701	N/A	PUBLIC CHARITY	GENERAL FUND	200
NEW HAMPSHIRE LAKES ASSOCIATION 33 TURNPIKE ROAD SOUTHBOROUGH, MA 01772	N/A	PUBLIC CHARITY	GENERAL FUND	150
NEW HAMPSHIRE PUBLIC TELEVISION 268 MAST ROAD DURHAM, NH 03824	N/A	PUBLIC CHARITY	GENERAL FUND	150
Total ► 3a				51,780

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
OPERA NORTH 20 WEST PARK STREET LEBANON, NH 03766	N/A	PUBLIC CHARITY	GENERAL FUND	200
PINE MANOR 400 HEATH STREET CHESTNUT HILL, MA 02467	N/A	PUBLIC CHARITY	GENERAL FUND	100
PLANNED PARENTHOOD 1110 VERMONT AVENUE WASHINGTON, DC 20005	N/A	PUBLIC CHARITY	GENERAL FUND	1,250
PUTNEY SCHOOL 418 HOUGHTON BROOK ROAD PUTNEY, VT 05346	N/A	PUBLIC CHARITY	GENERAL FUND	700
UNION OF CONCERNED SCIENTISTS 2 BRATTLE SQUARE CAMBRIDGE, MA 02238	N/A	PUBLIC CHARTITY	GENERAL FUND	200
ENVIRONMENTAL DEFENSE FUND 257 PARK AVENUE SOUTH NEW YORK, NY 10010	N/A	PUBLIC CHARITY	GENERAL FUND	450
CARE 151 ELLIS ST NE ATLANTA, GA 30303	N/A	PUBLIC CHARITY	GENERAL FUND	750
MASCOMA VALLEY HEALTH INITIAVE PO BOX 102 CANAAAN, NH 03741	NONE	PUBLIC CHARITY	GENERAL FUND	200
BBB WISE GIVING ALLIANCE 2014 3033 WILSON BLVD SUITE 600 ARLINGTON, VA 22201	N/A	PUBLIC CHARITY	GENERAL FUND	28,750
CONNECTICUT RIVER WATERSHED COUNCIL INC 15 BANK ROW GREENFIELD, MA 01301	N/A	PUBLIC CHARITY	GENERAL SUPPORT	100
NATIONAL TRUST FOR HISTORIC PRESERVATION THE WATERGATE OFFICE BUILDING WASHINGTON, DC 20037	N/A	PUBLIC CHARITY	GENERAL FUND	300
UPPER VALLEY MUSIC CENTER PO BOX 826 LEBANON, NH 03766	N/A	PUBLIC CHARITY	GENERAL FUND	100
SUSTAINABLE FAIRFAX 6 SCHOOL STREET FAIRFAX, CA 94930	N/A	OTHER PUBLIC CHARITY	GENERAL FUND	70
BEST BUDDIES INTERNATIONAL 100 SOUTHEAST SECOND ST MIAMI, FL 33131	N/A	OTHER PUBLIC CHARITY	GENERAL FUND	200
FOOD AND WATER WATCH 1616 P STREET NW WASHINGTON, DC 20036	N/A	OTHER PUBLIC CHARITY	GENERAL FUND	200
Total ► 3a				51,780

TY 2016 Accounting Fees Schedule**Name:** CROWELL FAMILY FOUNDATION 7522-07552000058**EIN:** 32-6011964

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION FEE	2,200	2,200		

TY 2016 Explanation of Non-Filing with Attorney General Statement

Name: CROWELL FAMILY FOUNDATION 7522-07552000058

EIN: 32-6011964

Statement: N/A

TY 2016 Investments Corporate Stock Schedule

Name: CROWELL FAMILY FOUNDATION 7522-07552000058
EIN: 32-6011964

Name of Stock	End of Year Book Value	End of Year Fair Market Value
300 SHS ABBOTT LABORATORIES	7,159	11,523
400 SHS ANSY INC	16,018	36,996
250 SHS ANHEUSER BUSH INBEV	23,652	26,360
350 SHS APPLE INC	17,227	40,537
200 BECTON DICKSON & CO	13,993	33,110
300 SHS BERKSHIRE HATHAWAY INC	19,201	48,894
700 SHS CARMAX INC	22,437	45,073
500 SHS CHEVRON CORP	54,842	58,850
600 SHS COCA COLA CO	15,109	24,876
500 SHS DANAHER CORP	14,326	38,920
400 SHS GILEAD SCIENCE INC	7,194	28,644
300 SHS HOME DEPOT INC	8,604	40,224
300 SHS JOHNSON & JOHNSON		
500 SHS JOHNSON CONTROLS INC	19,053	17,176
500 SHS METLIFE INC		
275 SHS PEPSICO INC	14,655	28,773
300 SHS RAYTHEON CO	13,754	42,600
350 SHS RESMED INC	11,529	21,718
150 SHS ROPER INDUSTRIES INC	20,964	27,462
400 SHS TJX COS INC	22,727	30,052
400 SHS SUNCOR ENERGY INC		
800 SHS HAIN CELESTIAL GROUP	31,158	31,224
600 SHS US BANCORP DEL	12,960	30,822
200 SHS UNITED TECHNOLOGIES CO	13,542	21,924
125 SHS VISA INC CLASS A SHARE	25,005	39,010
350 SHS WALGREENS BOOTS ALLIAN	10,541	28,966
300 SHS SCHLUMBERGER LTD	26,478	25,185
30 SHS ALPHABET INC CAP CL C	7,578	23,155
30 SHS ALPHABET INC CAP CL A	7,579	23,774
1,000 SHS BANK OF AMERICA CORP	15,540	22,100

Name of Stock	End of Year Book Value	End of Year Fair Market Value
700 SHS CF INDUSTRIES	28,776	22,036
300 SHS CVS HEALTH CORP	29,327	23,673
1,000 SHS HOSPITALITY PROPERTI	27,672	31,740
600 SHS NATIONAL OILWELL VARCO	30,016	22,464
300 SHS NOVARTIS AG SPON ADR	26,981	21,852
.6 SHS RMR GROUP INC CL A		
1,000 SHS SILICA HLDGS INC		

TY 2016 Investments - Other Schedule**Name:** CROWELL FAMILY FOUNDATION 7522-07552000058**EIN:** 32-6011964

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
860 SHS KAYNE ANDERSON MLP INV	AT COST	23,197	16,839
MANNING & NAPIER OVERSEAS	AT COST	41,610	30,750

TY 2016 Other Expenses Schedule**Name:** CROWELL FAMILY FOUNDATION 7522-07552000058**EIN:** 32-6011964**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OTHER NON-ALLOCABLE EXPENSE -	75	0		0

TY 2016 Other Professional Fees Schedule**Name:** CROWELL FAMILY FOUNDATION 7522-07552000058**EIN:** 32-6011964

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	5,976	5,976		

TY 2016 Taxes Schedule**Name:** CROWELL FAMILY FOUNDATION 7522-07552000058**EIN:** 32-6011964

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	569	0		0
PRIOR YEAR EXCISE TAX	375	0		0
FEDERAL ESTIMATED TAX	550	0		0
FOREIGN TAXES ON QUALIFIED FOR	75	0		0