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Form 990-PF

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2016

Open to Public Inspection

For calendar year 2016, or tax year beginning 04-01-2016, and ending 03-31-2017

Name of foundation
REUBEN AND LIZZIE GROSSMAN FOUNDATION
INC

A Employer identification number
20-3918661

Number and street (or P.O. box number if mail is not delivered to street address)
1266 FURNACE BROOK PARKWAY NO 408

Room/suite

B Telephone number (see instructions)
(617) 773-0400

City or town, state or province, country, and ZIP or foreign postal code
QUINCY, MA 02169

C If exemption application is pending, check here

G Check all that apply

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

D 1. Foreign organizations, check here

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

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

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

I Fair market value of all assets at end of year (from Part II, col (c), line 16)\$ 1,725,486

J Accounting method
☒ Cash ☐ Accrual
☐ Other (specify) (Part I, column (d) must be on cash basis)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	1,100		
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B			
	3 Interest on savings and temporary cash investments	5,474	5,474	
	4 Dividends and interest from securities	31,213	31,213	
	5a Gross rents			
	b Net rental income or (loss)			
	6a Net gain or (loss) from sale of assets not on line 10	82,927		
	b Gross sales price for all assets on line 6a	273,479		
	7 Capital gain net income (from Part IV, line 2)		82,927	
	8 Net short-term capital gain			
	9 Income modifications			
	10a Gross sales less returns and allowances			
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)				
12 Total. Add lines 1 through 11	120,714	119,614		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	12,513	12,513	0
	14 Other employee salaries and wages			
	15 Pension plans, employee benefits			
	16a Legal fees (attach schedule)			
	b Accounting fees (attach schedule)			
	c Other professional fees (attach schedule)	35,831	15,496	0
	17 Interest			
	18 Taxes (attach schedule) (see instructions)	401	366	0
	19 Depreciation (attach schedule) and depletion			
	20 Occupancy			
	21 Travel, conferences, and meetings			
	22 Printing and publications			
	23 Other expenses (attach schedule)	3,679	2,599	54
	24 Total operating and administrative expenses. Add lines 13 through 23	52,424	30,974	54
	25 Contributions, gifts, grants paid	80,005		80,005
26 Total expenses and disbursements. Add lines 24 and 25	132,429	30,974	80,059	
	27 Subtract line 26 from line 12			
	a Excess of revenue over expenses and disbursements	-11,715		
	b Net investment income (if negative, enter -0-)		88,640	
c Adjusted net income (if negative, enter -0-)				

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form 990-PF (2016)

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 (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing		9,394	9,394
	2	Savings and temporary cash investments	100,967	78,571	78,571
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	937,454	727,848	1,377,448
	c	Investments—corporate bonds (attach schedule)	48,860	259,838	258,703
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	1,000	1,000	1,000
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)	455	370	370	
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	1,088,736	1,077,021	1,725,486	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable.			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule).			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted	1,088,736	1,077,021	
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg, and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see instructions)	1,088,736	1,077,021	
31	Total liabilities and net assets/fund balances (see instructions) .	1,088,736	1,077,021		

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	1,088,736
2	Enter amount from Part I, line 27a	2	-11,715
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	1,077,021
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	1,077,021

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)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	2	82,927
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	86,291	1,674,405	0 051535
2014	82,159	1,756,512	0 046774
2013	76,942	1,682,495	0 045731
2012	74,767	1,581,656	0 047271
2011	83,436	1,515,072	0 055071
2 Total of line 1, column (d)			2 0 246382
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 049276
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5			4 1,610,581
5 Multiply line 4 by line 3			5 79,363
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 886
7 Add lines 5 and 6			7 80,249
8 Enter qualifying distributions from Part XII, line 4			8 80,059

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 type="checkbox"/> and enter 1% of Part I, line 27b	1	1,773
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	1,773
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	1,773
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	1,252
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	1,252
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	521
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be Credited to 2017 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11	

Part VII-A Statements Regarding Activities

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

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	13	Yes	
14	The books are in care of ► <u>THOMAS S GROSSMAN TREASURER</u> Telephone no ► <u>(617) 773-0400</u>			

Located at ► GROSS OFFICE 1266 FURNACE BROOK PARKWAY STE 408 QUINCY MA ZIP+4 ► 02169

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 checked="" type="checkbox"/> Yes <input 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)?	1b		No
	Organizations relying on a current notice regarding disaster assistance check here.			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016?		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
	If "Yes," list the years ► 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions)	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b	If "Yes," did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2016?	4b		No

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

5a During the year did the foundation pay or incur any amount to <div style="margin-top: 5px;"> (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No </div> <div style="margin-top: 5px;"> (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 </div> <div style="margin-top: 5px;"> (3) Provide a grant to an individual for travel, study, or other similar purposes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No </div> <div style="margin-top: 5px;"> (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 </div> <div style="margin-top: 5px;"> (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 </div>			
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"/>	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	6b		No
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <input type="checkbox"/> <i>If "Yes" to 6b, file Form 8870</i>			
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	7b		
b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? <input type="checkbox"/>			

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
JAMES B GROSSMAN 42 CENTRAL AVE SOUTH BURLINGTON, VT 05403	PRESIDENT 1 00	0	0	0
THOMAS S GROSSMAN PO BOX 738 ROCKPORT, MA 01966	TREASURER & CLERK 2 50	12,513	0	0
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
NONE				
Total number of other employees paid over \$50,000.				0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)
3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

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

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1	
2	
3	
4	

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	1,540,642
b	Average of monthly cash balances.	1b	94,466
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	1,635,108
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	1,635,108
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	24,527
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	1,610,581
6	Minimum investment return. Enter 5% of line 5.	6	80,529

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	80,529
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	1,773
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,773
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	78,756
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	78,756
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	78,756

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	80,059
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	80,059
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	80,059

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				78,756
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only.			79,979	
b Total for prior years 20____, 20____, 20____		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.	0			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ 80,059				
a Applied to 2015, but not more than line 2a			79,979	
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.				80
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				78,676
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.				
b Excess from 2013.				
c Excess from 2014.				
d Excess from 2015.				
e Excess from 2016.				

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

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

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

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

	Tax year	Prior 3 years			(e) Total
	(a) 2016	(b) 2015	(c) 2014	(d) 2013	
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					

3 Complete 3a, b, or c for the alternative test relied upon

a "Assets" alternative test—enter

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.

c "Support" alternative test—enter

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).

(3) Largest amount of support from an exempt organization

(4) Gross investment income

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

1 Information Regarding Foundation Managers:

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

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number or email address of the person to whom applications should be addressed

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

c Any submission deadlines

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

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			3a	80,005
b <i>Approved for future payment</i>				
Total			3b	0

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments			14	5,474	
4 Dividends and interest from securities. . . .			14	31,213	
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	82,927	
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). .		0		119,614	0
13 Total. Add line 12, columns (b), (d), and (e).			13		119,614

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

Part XVII

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

[illegible]

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

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

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

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

Print/Type preparer's name GARY WEINMAN CPA	Preparer's Signature	Date	Check if self-employed ► <input type="checkbox"/>	PTIN P01059267
Firm's name ► KATZ NANNIS SOLOMON PC				Firm's EIN ► 04-2887211
Firm's address ► 800 SOUTH STREET SUITE 250 WALTHAM, MA 024531480				Phone no (781) 453-8700

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)
QUALCOMM INC - SOLD 250 SH	P	2009-06-19	2016-04-21
MONSANTO CO - SOLD 100 SH	P	2008-09-23	2016-04-21
CALIFORNIA RESOURCES - SOLD 28 SH	P	2010-06-30	2016-05-20
METLIFE INC 6 75%-6/1/16	P	2010-06-30	2016-06-01
PNC FUNDING 2 7%-9/19/16	P	2010-06-30	2016-08-22
DEERE & CO - SOLD 250 SH	P	2008-04-01	2016-08-23
ECOLAB INC - SOLD 200 SH	P	2006-10-10	2016-08-23
MICROSOFT CORP - SOLD 300 SH	P	1999-07-01	2016-08-23
PAYCHEX INC - SOLD 500 SH	P	2010-06-30	2016-08-23
HONEYWELL INT'L - SOLD 200 SH	P	2002-04-10	2016-08-23

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)
12,823		11,421	1,402
9,410		11,599	-2,189
44		37	7
15,000		15,823	-823
15,000		15,176	-176
22,096		20,581	1,515
24,556		8,870	15,686
17,359		13,631	3,728
30,337		18,111	12,226
23,380		7,982	15,398

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			(I) 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	
			1,402
			-2,189
			7
			-823
			-176
			1,515
			15,686
			3,728
			12,226
			15,398

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)
FEDEX CORP - SOLD 100 SH	P	2007-03-28	2016-08-23
JOHNSON CONTROLS INC MERGER	P	2008-06-03	2016-09-08
WELLS FARGO CO - SOLD 900 SH	P	2002-03-20	2016-09-12
JOHNSON CONTROLS INTL - SOLD 85 SH	P	2016-09-02	2016-09-15
ADIENT PLC - SOLD 70 SH	P	2016-11-08	2016-10-31
JOHNSON CONTROLS INTL - SOLD 417 SH	P	2017-01-03	2016-09-15
ADIENT PLC - SOLD 41 SH	P	2016-11-08	2017-01-03
UNRECAP SEC 1250- GAINS	P		
CAPTIAL GAIN -1099	P		

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)
16,916		10,934	5,982
22,967		16,822	6,145
43,546		22,437	21,109
38		41	-3
31		33	-2
17,568		20,062	-2,494
2,408		1,909	499
			1,247
			3,670

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			(I) 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	
			5,982
			6,145
			21,109
			-3
			-2
			-2,494
			499
			1,247
			3,670

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
WISE MARINE - STUDENT AWARDS PROGRAM 66 JOHN WISE AVE ESSEX, MA 01929		SCHOOL	TO SUPPORT THE EDUCATIONAL ORGANIZATION'S MISSION	2,075
TEMPLE EMANUEL 385 WARD ST NEWTON CENTER, MA 02459		RELIGIOUS	TO SUPPORT ORGANIZATION'S RELIGIOUS MISSION	20
CROWN TROPHY - STUDENT AWARDS PROGRAM 300 OAK STREET SUITE 780 PEMBROKE, MA 02359		SCHOOL	TO SUPPORT THE EDUCATIONAL ORGANIZATION'S MISSION	459
HONORCRAFT - STUDENT AWARDS PROGRAM 292 PAGE ST STOUGHTON, MA 02072		SCHOOL	TO SUPPORT THE EDUCATIONAL ORGANIZATION'S MISSION	472
CONGENITAL HEART WALK 3300 HENRY AVENUE SUITE 112 PHILADELPHIA, PA 19129		CHARITABLE	TO SUPPORT THE CHARITABLE ORGANIZATION'S MISSION	300
Total ► 3a				80,005

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
TEMPLE AHAVAT ACHIM 86 MIDDLE STREET GLOUCESTER, MA 01930		RELIGIOUS	TO SUPPORT THE ORGANIZATION'S RELIGIOUS MISSION	100
BRANDEIS NATIONAL COMMITTEE PO BOX 549110 MS 126 WALTHAM, MA 02454		SCHOOL	TO SUPPORT THE EDUCATIONAL ORGANIZATION'S MISSION	500
TEMPLE ISRAEL 477 LONGWOOD AVENUE BOSTON, MA 02215		RELIGIOUS	TO SUPPORT THE ORGANIZATION'S RELIGIOUS MISSION	50
TEMPLE ISRAEL 477 LONGWOOD AVENUE BOSTON, MA 02215		RELIGIOUS	TO SUPPORT THE ORGANIZATION'S RELIGIOUS MISSION	25
NEW ENGLAND HEBREW ACADEMY 9 PRESCOTT STREET BROOKLINE, MA 02446		SCHOOL	TO SUPPORT THE EDUCATIONAL ORGANIZATION'S MISSION	25
Total ▶ 3a				80,005

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
TEMPLE EMANUEL 385 WARD ST NEWTON CENTER, MA 02459		RELIGIOUS	TO SUPPORT THE ORGANIZATION'S RELIGIOUS MISSION	25
ROFEH INTERNATIONAL 1710 BEACON STREET BROOKLINE, MA 02445		SCHOOL	TO SUPPORT THE EDUCATIONAL ORGANIZATION'S MISSION	150
TEMPLE ISRAEL 477 LONGWOOD AVENUE BOSTON, MA 02215		RELIGIOUS	TO SUPPORT THE CHARITABLE ORGANIZATION'S RELIGIOUS MISSION	25
NEIGHBORHOOD CLUB OF QUINCY - LUNCHEON DEPOSIT 27 GLENDALE ROAD QUINCY, MA 02169		CHARITABLE	TO SUPPORT THE CHARITABLE ORGANIZATION'S MISSION	500
TEMPLE EMANUEL 385 WARD ST NEWTON CENTER, MA 02459		SCHOOL	TO SUPPORT THE CHARITABLE ORGANIZATION'S EDUCATIONAL MISSION	25
Total 				80,005
3a				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
HEBREW COLLEGE 160 HERRICK ROAD NEWTON CENTER, MA 02459		SCHOOL	TO SUPPORT THE CHARITABLE ORGANIZATION'S EDUCATIONAL MISSION	2,500
NEW ENGLAND HEBREW ACADEMY 9 PRESCOTT STREET BROOKLINE, MA 02446		SCHOOL	TO SUPPORT THE CHARITABLE ORGANIZATION'S EDUCATIONAL MISSION	25
TEMPLE EMANUEL 385 WARD ST NEWTON CENTER, MA 02459		RELIGIOUS	TO SUPPORT THE CHARITABLE ORGANIZATION'S RELIGIOUS MISSION	25
TEMPLE EMANUEL 385 WARD ST NEWTON CENTER, MA 02459		RELIGIOUS	TO SUPPORT THE CHARITABLE ORGANIZATION'S RELIGIOUS MISSION	25
TEMPLE ISRAEL 477 LONGWOOD AVENUE BOSTON, MA 02215		RELIGIOUS	TO SUPPORT THE CHARITABLE ORGANIZATION'S RELIGIOUS MISSION	25
Total ► 3a				80,005

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
NEIGHBORHOOD CLUB OF QUINCY - LUNCHEON 27 GLENDALE ROAD QUINCY, MA 02169		CHARITABLE	TO SUPPORT THE CHARITABLE ORGANIZATION'S MISSION	1,463
TOWN OF ABINGTON 201 GLINIEWICZ WAY ABINGTON, MA 02351		COMMUNITY	TO SUPPORT THE CHARITABLE ORGANIZATION'S EDUCATIONAL MISSION	1,500
ARCHBISHOP WILLIAMS HIGH SCHOOL 40 INDEPENDENCE AVE BRAINTREE, MA 02184		SCHOOL	TO SUPPORT THE CHARITABLE ORGANIZATION'S EDUCATIONAL MISSION	1,500
BRAINTREE HIGH SCHOOL SCHOLARSHIP FUND 128 TOWN STREET BRAINTREE, MA 02184		SCHOOL	TO SUPPORT THE CHARITABLE ORGANIZATION'S EDUCATIONAL MISSION	1,500
HANOVER HIGH SCHOOL 287 CEDAR STREET HANOVER, MA 02339		SCHOOL	TO SUPPORT THE CHARITABLE ORGANIZATION'S EDUCATIONAL MISSION	1,500
Total ► 3a				80,005

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


Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
HINGHAM HIGH SCHOOL FUND 17 UNION STREET HINGHAM, MA 02043		SCHOOL	TO SUPPORT THE CHARITABLE ORGANIZATION'S EDUCATIONAL MISSION	1,500
HULL HIGH SCHOOL 180 MAIN STREET HULL, MA 02045		SCHOOL	TO SUPPORT THE CHARITABLE ORGANIZATION'S EDUCATIONAL MISSION	1,500
MARSHFIELD HIGH SCHOOL GENERAL FUND 167 FOREST STREET MASHFIELD, MA 02050		SCHOOL	TO SUPPORT THE CHARITABLE ORGANIZATION'S EDUCATIONAL MISSION	1,500
MILTON HIGH SCHOOL SCHOLARSHIP FUD 25 GILE ROAD MILTON, MA 02186		SCHOOL	TO SUPPORT THE CHARITABLE ORGANIZATION'S EDUCATIONAL MISSION	1,500
NEEDHAM PUBLIC SCHOOLS 1330 HIGHLAND AVENUE NEEDHAM, MA 02171		SCHOOL	TO SUPPORT THE CHARITABLE ORGANIZATION'S EDUCATIONAL MISSION	1,500
Total ► 3a				80,005

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
NORWELL HIGH SCHOOL 18 SOUTH STREET NORWELL, MA 02061		SCHOOL	TO SUPPORT THE CHARITABLE ORGANIZATION'S EDUCATIONAL MISSION	1,500
NORTH QUINCY HIGH SCHOOL 316 HANCOCK STREET QUINCY, MA 02171		SCHOOL	TO SUPPORT THE CHARITABLE ORGANIZATION'S EDUCATIONAL MISSION	1,500
QUINCY HIGH SCHOOL 100 CODDINGTON STREET QUINCY, MA 02169		SCHOOL	TO SUPPORT THE CHARITABLE ORGANIZATION'S EDUCATIONAL MISSION	1,500
RANDOLPH HIGH SCHOOL 70 MEMORIAL WAY RANDOLPH, MA 02368		SCHOOL	TO SUPPORT THE CHARITABLE ORGANIZATION'S EDUCATIONAL MISSION	1,500
TOWN OF ROCKLAND 52 MACKINLAY WAY ROCKLAND, MA 02370		COMMUNITY	TO SUPPORT THE CHARITABLE ORGANIZATION'S EDUCATIONAL MISSION	1,500
Total ► 3a				80,005

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THAYER ACADEMY 745 WASHINGTON STREET BRAINTREE, MA 02184		SCHOOL	TO SUPPORT THE CHARITABLE ORGANIZATION'S EDUCATIONAL MISSION	1,500
WEYMOUTH PUBLIC SCHOOLS ONE WILDCAT WAY WEYMOUTH, MA 02190		SCHOOL	TO SUPPORT THE CHARITABLE ORGANIZATION'S EDUCATIONAL MISSION	1,500
WOODWARD SCHOOL FOR GIRLS 1102 HANCOCK STREET QUINCY, MA 02169		SCHOOL	TO SUPPORT THE CHARITABLE ORGANIZATION'S EDUCATIONAL MISSION	1,500
HEBREW COLLEGE(PROZDOR) 160 HERRICK ROAD NEWTON CENTER, MA 02459		SCHOOL	TO SUPPORT THE CHARITABLE ORGANIZATION'S EDUCATIONAL MISSION	1,500
COMBINED JEWISH PHILANTHROPIES 126 HIGH STREET BOSTON, MA 02110		SCHOOL	TO SUPPORT THE CHARITABLE ORGANIZATION'S EDUCATIONAL MISSION	3,200
Total ► 3a				80,005

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
HEBREW SENIOR LIFE 1200 CENTRE STREET BOSTON, MA 02131		CHARITABLE	TO SUPPORT THE CHARITABLE ORGANIZATION'S MISSION	4,500
JEWISH FAMILY & CHILDREN'S SERVICES 1430 MAIN STREET WALTHAM, MA 02451		CHARITABLE	TO SUPPORT CHARITABLE ORGANIZATION'S MISSION	4,600
ROFEH INTERNATIONAL 1710 BEACON STREET BROOKLINE, MA 02445		SCHOOL	TO SUPPORT THE EDUCATIONAL MISSION	1,750
MAIMONIDES SCHOOL 34 PHILBROOK ROAD BROOKLINE, MA 02445		SCHOOL	TO SUPPORT THE EDUCATIONAL MISSION	1,500
YIDDISH BOOK CENTER 1021 WEST STREET AMHERST, MA 01002		SCHOOL	TO SUPPORT THE EDUCATIONAL MISSION	525
Total 				80,005
3a				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
TEMPLE AHAVAT ACHIM 86 MIDDLE STREET GLOUCESTER, MA 01930		RELIGIOUS	TO SUPPORT THE ORGANIZATION'S RELIGIOUS MISSION	3,700
TEMPLE EMANUEL 385 WARD ST NEWTON CENTER, MA 02459		RELIGIOUS	TO SUPPORT THE ORGANIZATION'S RELIGIOUS MISSION	3,650
NEW ENGLAND HEBREW ACADEMY 9 PRESCOTT STREET BROOKLINE, MA 02446		SCHOOL	TO SUPPORT THE CHARITABLE ORGANIZATION'S MISSION	9,191
LOWN CARDIOVASCULAR GROUP 830 BOYLSTON STREET SUITE 205 CHESTNUTHILL, MA 02467		CHARITABLE	TO SUPPORT THE CHARITABLE ORGANIZATION'S MISSION	3,200
COLBY COLLEGE 4335 MAYFLOWER HILL WATERVILLE, ME 04901		SCHOOL	TO SUPPORT THE EDUCATIONAL ORGANIZATION'S MISSION	1,750
Total ▶ 3a				80,005

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
TEMPLE ISRAEL 477 LONGWOOD AVENUE BOSTON, MA 02215		RELIGIOUS	TO SUPPORT THE CHARITABLE ORGANIZATION'S RELIGIOUS MISSION	2,100
TEMPLE B'NAI ABRAHAM 200 EAST LOTHROP STREET BEVERLY, MA 01915		RELIGIOUS	TO SUPPORT THE CHARITABLE ORGANIZATION'S RELIGIOUS MISSION	100
HEBREW UNION COLLEGE 1 WEST 4TH STREET NEW YORK, NY 10012		SCHOOL	TO SUPPORT THE CHARITABLE ORGANIZATION'S EDUCATIONAL MISSION	100
SHALEM FOUNDATION 845 THIRD AVENUE NEW YORK, NY 10022		CHARITABLE	TO SUPPORT THE CHARITABLE ORGANIZATION'S MISSION	1,000
AMERICAN JEWISH JOINT DISTRIBUTION COMMITTEE 711 THIRD AVENUE SUITE 900 NEW YORK, NY 10017		RELIGIOUS	TO SUPPORT THE CHARITABLE ORGANIZATION'S RELIGIOUS MISSION	200
Total ► 3a				80,005

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
COMMITTEE FOR ACCURACY IN MIDDLE EAST REPORTING PO BOX 35040 BOSTON, MA 02135		SCHOOL	TO SUPPORT THE CHARITABLE ORGANIZATION'S EDUCATIONAL MISSION	100
LEO PALS INC 1449 RIDGE ROAD ELIZBETH, PA 17022		CHARITABLE	TO SUPPORT THE CHARITABLE ORGANIZATION'S MISSION	500
HEBREW COLLEGE 160 HERRICK ROAD NEWTON CENTER, MA 02459		SCHOOL	TO SUPPORT THE CHARITABLE ORGANIZATION'S EDUCATIONAL MISSION	2,500
TEMPLE ISRAEL 477 LONGWOOD AVENUE BOSTON, MA 02215		RELIGIOUS	TO SUPPORT THE CHARITABLE ORGANIZATION'S RELIGIOUS MISSION	25
Total ► 3a				80,005

TY 2016 Investments Corporate Bonds Schedule

Name: REUBEN AND LIZZIE GROSSMAN FOUNDATION
INC

EIN: 20-3918661

Name of Bond	End of Year Book Value	End of Year Fair Market Value
CORPORATE BONDS	259,838	258,703

TY 2016 Investments Corporate Stock Schedule

Name: REUBEN AND LIZZIE GROSSMAN FOUNDATION
INC

EIN: 20-3918661

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CORPORATE STOCK	727,848	1,377,448

TY 2016 Investments - Other Schedule

Name: REUBEN AND LIZZIE GROSSMAN FOUNDATION
INC

EIN: 20-3918661

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
1000 STATE OF ISRAEL BOND	AT COST	1,000	1,000

TY 2016 Other Assets Schedule

Name: REUBEN AND LIZZIE GROSSMAN FOUNDATION
INC

EIN: 20-3918661

Other Assets Schedule

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
PURCHASE INTEREST	455	370	370

TY 2016 Other Expenses Schedule

Name: REUBEN AND LIZZIE GROSSMAN FOUNDATION
INC

EIN: 20-3918661

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INSURANCE	500	0		25
MISC	133	0		7
OFFICE SUPPLIES	447	0		22
BOND AMORTIZATION	2,599	2,599		0

TY 2016 Other Professional Fees Schedule

Name: REUBEN AND LIZZIE GROSSMAN FOUNDATION
INC

EIN: 20-3918661

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MANAGEMENT FEES	13,237	13,237		0
ACCOUNTING FEES	22,594	2,259		0

TY 2016 Taxes Schedule

Name: REUBEN AND LIZZIE GROSSMAN FOUNDATION
INC

EIN: 20-3918661

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MASS TAX	35	0		0
FOREIGN TAXES PAID	366	366		0