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Return of Private Foundation

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

Department of the Treasury
Internal Revenue Service

OMB No 1545-0052

2016

Open to Public Inspection

For calendar year 2016 or tax year beginning Jul 1, 2016, and ending Jun 30, 2017

Name of foundation <u>Wheelwright Scientific School</u>	A Employer identification number <u>04-6004390</u>
Number and street (or P O box number if mail is not delivered to street address) <u>C/O Anna Makos, PO Box 510</u>	Room/suite
City or town, state or province, country, and ZIP or foreign postal code <u>Newburyport MA 01950</u>	
G Check all that apply <input checked="" type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change	
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	
I Fair market value of all assets at end of year (from Part II, column (c), line 16) ► \$ 4,174,622.	J Accounting method (Part I, column (d) must be on cash basis) <input type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)

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	157.	157.	0.	
	4 Dividends and interest from securities	75,558.	75,558.	0.	
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	90,240.	I-6a Stmt		
	b Gross sales price for all assets on line 6a	1,004,390.			
	7 Capital gain net income (from Part IV, line 2)		90,240.		
	8 Net short-term capital gain			0.	
	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.	165,955.	165,955:	1 OCT 10 2017		
ADMINISTRATIVE EXPENSES	13 Compensation of officers, directors, trustees, etc	43,650.	4,365:		39,285.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	2,395.	2,395.		2,395.
	b Accounting fees (attach sch)	9,645.	1,573.		8,072.
	c Other professional fees (attach sch)	25,344.	25,283.		61.
	17 Interest				
	18 Taxes (attach schedule)(see Instrs) See Line 18 Stmt		2,302.		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) See Line 23 Stmt		1,208.		1,208.
	24 Total operating and administrative expenses. Add lines 13 through 23	84,544.	33,616.		51,021.
25 Contributions, gifts, grants paid	154,883.			154,883.	
26 Total expenses and disbursements. Add lines 24 and 25	239,427.	33,616.		205,904.	
27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements		-73,472.			
b Net Investment Income (if negative, enter -0-)		132,339.		0.	
c Adjusted net income (if negative, enter -0-)					

S23

17

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		
		End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value
A S S E T S	1 Cash – non-interest-bearing			
	2 Savings and temporary cash investments	168,155.	378,860.	378,860.
	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 sch)			
	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)	2,016,624.	1,883,181.	3,040,310.
	c Investments – corporate bonds (attach schedule)	906,504.	755,770.	755,452.
L I A B I L I T I E S	11 Investments – land, buildings, and equipment basis			
	Less accumulated depreciation (attach schedule)			
	12 Investments – mortgage loans			
	13 Investments – other (attach schedule)			
	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)	3,091,283.	3,017,811.	4,174,622.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe)			
	23 Total liabilities (add lines 17 through 22)			
N F T A S S E T S	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	3,091,283.	3,017,811.	
	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)	3,091,283.	3,017,811.	
	31 Total liabilities and net assets/fund balances (see instructions)	3,091,283.	3,017,811.	

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	3,091,283.
2 Enter amount from Part I, line 27a	2	-73,472.
3 Other Increases not included in line 2 (itemize)	3	
4 Add lines 1, 2, and 3	4	3,017,811.
5 Decreases not included in line 2 (itemize)	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	3,017,811.

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 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a Publicly traded securities - long term - see attached		P	06/30/16	06/30/17
b Publicly traded securities - short term - see attached		P	06/30/17	06/30/17
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 994,473.		902,887.	91,586.	
b 9,917.		11,263.	-1,346.	
c				
d				
e				
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		
a				91,586.
b				-1,346.
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	90,240.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)			3	-1,346.
If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8				

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 the 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			
2014			
2013			
2012			
2011			
2 Total of line 1, column (d)			2
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
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5.			4
5 Multiply line 4 by line 3			5
6 Enter 1% of net investment income (1% of Part I, line 27b)			6
7 Add lines 5 and 6.			7
8 Enter qualifying distributions from Part XII, line 4			8

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)

1 a	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)				
1				2,647.
1 b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here			
2				0.
3	Add lines 1 and 2.			2,647.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			0.
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-			2,647.
6	Credits/Payments			
6 a	a 2016 estimated tax pmts and 2015 overpayment credited to 2016			1,080.
6 b	b Exempt foreign organizations – tax withheld at source			
6 c	c Tax paid with application for extension of time to file (Form 8868)			
6 d	d Backup withholding erroneously withheld			
7	7 Total credits and payments Add lines 6a through 6d			1,080.
8	Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached			0.
9	9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			1,567.
10	10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			0.
11	11 Enter the amount of line 10 to be Credited to 2017 estimated tax			0. Refunded

Part VII-A Statements Regarding Activities

1 a	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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
1 b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities			
1 c	Did the foundation file Form 1120-POL for this year?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> 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?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
If 'Yes,' attach a detailed description of the activities			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
4 a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
b	If 'Yes,' has it filed a tax return on Form 990-T for this year?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
If 'Yes,' attach the statement required by General Instruction T			
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?			
7	Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, col (c), and Part XV	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
8 a	Enter the states to which the foundation reports or with which it is registered (see instructions)		
MASSACHUSETTS			
b	If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If 'No,' attach explanation	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> 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)? If 'Yes,' complete Part XIV	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No

Part VII-A Statements Regarding Activities (continued)

11	Yes	No
11		X
12		X
13		X
Website address ▶ N/A		
14	The books are in care of ▶ Anna Makos Telephone no ▶ (978) 462-2344	
Located at ▶ 184 High Street, PO Box 510 Newburyport MA ZIP + 4 ▶ 01950		
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	Yes	No
16		X
See the instructions for exceptions and filing requirements for FinCEN Form 114. If 'Yes,' enter the name of the foreign country ▶		

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

File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.		
1 a	During the year did the foundation (either directly or indirectly)	
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ▶ <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ▶ <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ▶ <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ▶ <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ▶ <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) ▶ <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is 'Yes' to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? ▶ <input type="checkbox"/>	
Organizations relying on a current notice regarding disaster assistance check here ▶ <input type="checkbox"/>		
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? ▶ <input type="checkbox"/>	
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) ▶ <input type="checkbox"/>		
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_ _		
3 a	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) ▶ <input type="checkbox"/>		
4 a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? ▶ <input type="checkbox"/>	
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? ▶ <input type="checkbox"/>		

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

5 a 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)?			5 b	
Organizations relying on a current notice regarding disaster assistance check here	<input type="checkbox"/>			
c If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No		
If 'Yes,' attach the statement required by Regulations section 53.4945–5(d)				
6 a 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?			6 b	X
If 'Yes' to 6b, file Form 8870				
7 a 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?			7 b	

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	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
John W. Pramberg P.O. Box 455 Newburyport MA 01950	Trustee 2.00	5,900.	0.	0.
John C. Elwell 266 High Street Newburyport MA 01950	Trustee 2.00	8,650.	0.	0.
Peter DeMaranville 4 Adams Street Newburyport MA 01950	Trustee 2.00	5,900.	0.	0.
See Information about Officers, Directors, Trustees, Etc		23,200.	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	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
None				

Total number of other employees paid over \$50,000				None

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

None

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	<u>Provided scholarships for students attending university</u>	
2		154,883.
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		

BAA

Form 990-PF (2016)

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	3,783,237.
b	Average of monthly cash balances	1b	218,884.
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	4,002,121.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	4,002,121.
4	Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	60,032.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,942,089.
6	Minimum investment return. Enter 5% of line 5	6	197,104.

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	197,104.
2a	Tax on investment income for 2016 from Part VI, line 5	2a	2,647.
b	Income tax for 2016 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	2,647.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	194,457.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	194,457.
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	194,457.

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	205,904.
b	Program-related investments — total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	205,904.
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	205,904.

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				194,457.
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only			188,182.	
b Total for prior years 20 ____, 20 ____, 20 ____				
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 ► \$ 205,904.				
a Applied to 2015, but not more than line 2a			188,182.	
b Applied to undistributed income of prior years (Election required — see instructions)				
c Treated as distributions out of corpus (Election required — see instructions)				
d Applied to 2016 distributable amount				17,722.
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))				
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				
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				176,735.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required — see instructions)				
8 Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions)	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)

N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2016, enter the date of the ruling.			
b Check box to indicate whether the foundation is a private operating foundation described in section	<input type="checkbox"/>	4942(j)(3) or	4942(j)(5)
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed			
b 85% of line 2a			
c Qualifying distributions from Part XII, line 4 for each year listed			
d Amounts included in line 2c not used directly for active conduct of exempt activities			
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c			
3 Complete 3a, b, or c for the alternative test relied upon			
a 'Assets' alternative test — enter			
(1) Value of all assets			
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)			
b 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed			
c 'Support' alternative test — enter			
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)			
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(ii)			
(3) Largest amount of support from an exempt organization			
(4) Gross investment income			

Part XVI. Supplementary Information (Complete this part only if the foundation 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

John C. Elwell
266 High Street
Newburyport MA 01950 (978) 462-8749

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

See attached application

c Any submission deadlines

April 30th

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

Residents of Newburyport pursuing a field of study in engineering or basic science. See attached application.

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 Paid during the year				
Villanova 800 E. Lancaster Avenue Villanova PA 19085		Public Charity	Tuition Scholarship	26,500.
Southern California Institute of Architecture 960 E Third Street Los Angeles CA 90013		Public Charity	Tuition Scholarship	7,000.
University of Vermont PO Box 1306 Williston VT 05495		Public Charity	Tuition Scholarship	20,050.
University of Connecticut Storrs Campus Storrs CT 06269		Public Charity	Tuition Schloarship	26,500.
Dartmouth 6016 McNutt Hall Hanover NH 03755		Public Charity	Tuition Scholarship	21,833.
Wentworth Institute of Technology 550 Huntington Avenue Boston MA 02115		Public Charity	Tuition Scholarship	26,500.
Hamilton College 198 College Hill Road Clinton NY 13323		Public Charity	Tuition Scholarship	26,500.
Total			► 3a	154,883.
b Approved for future payment				
Total			► 3b	

Part XVI-A Analysis of Income-Producing Activities

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) Exclu- sion 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	157.	
4 Dividends and interest from securities			14	75,558.	
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	90,240.	
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)				165,955.	
13 Total. Add line 12, columns (b), (d), and (e)				13	165,955.

(See worksheet in line 13 instructions to verify calculations)

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

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

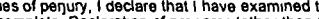
		Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		
a	Transfers from the reporting foundation to a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

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

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

<p>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.</p>	
<p>Sign Here</p>	
<p>Signature of officer or trustee</p>	<p>10/9/17</p>
	<p>Date</p>
	<p>► Trustee</p>
	<p>Title</p>
<p>May the IRS discuss this return with the preparer shown below (see instructions)?</p>	
<p><input type="checkbox"/> Yes</p>	<p><input type="checkbox"/> No</p>

Paid Preparer Use Only	Firm/Type preparer's name		Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	Stephen J. DeGuglielmo, CPA			05/05/17		P00166992
	Firm's name	FRITZ DEGUGLIELMO LLC			Firm's EIN	04-3447507
Firm's address	8 ESSEX STREET NEWBURYPORT			MA 01950	Phone no	(978) 462-2161

BAA

Name Wheelwright Scientific School	Employer Identification Number 04-6004390		
Asset Information:			
Description of Property	Publicly traded securities - long term		
Date Acquired	various	How Acquired	Purchased
Date Sold	various	Name of Buyer	
Sales Price	994,473.	Cost or other basis (do not reduce by depreciation)	902,887.
Sales Expense		Valuation Method	
Total Gain (Loss)	91,586.	Accumulation Depreciation	
Description of Property	Publicly traded securities		
Date Acquired	various	How Acquired	Purchased
Date Sold	various	Name of Buyer	
Sales Price	9,917.	Cost or other basis (do not reduce by depreciation)	11,263.
Sales Expense		Valuation Method	
Total Gain (Loss)	-1,346.	Accumulation Depreciation	
Description of Property			
Date Acquired		How Acquired	
Date Sold		Name of Buyer	
Sales Price		Cost or other basis (do not reduce by depreciation)	
Sales Expense		Valuation Method	
Total Gain (Loss)		Accumulation Depreciation	
Description of Property			
Date Acquired		How Acquired	
Date Sold		Name of Buyer	
Sales Price		Cost or other basis (do not reduce by depreciation)	
Sales Expense		Valuation Method	
Total Gain (Loss)		Accumulation Depreciation	
Description of Property			
Date Acquired		How Acquired	
Date Sold		Name of Buyer	
Sales Price		Cost or other basis (do not reduce by depreciation)	
Sales Expense		Valuation Method	
Total Gain (Loss)		Accumulation Depreciation	
Description of Property			
Date Acquired		How Acquired	
Date Sold		Name of Buyer	
Sales Price		Cost or other basis (do not reduce by depreciation)	
Sales Expense		Valuation Method	
Total Gain (Loss)		Accumulation Depreciation	
Description of Property			
Date Acquired		How Acquired	
Date Sold		Name of Buyer	
Sales Price		Cost or other basis (do not reduce by depreciation)	
Sales Expense		Valuation Method	
Total Gain (Loss)		Accumulation Depreciation	
Description of Property			
Date Acquired		How Acquired	
Date Sold		Name of Buyer	
Sales Price		Cost or other basis (do not reduce by depreciation)	
Sales Expense		Valuation Method	
Total Gain (Loss)		Accumulation Depreciation	
Description of Property			
Date Acquired		How Acquired	
Date Sold		Name of Buyer	
Sales Price		Cost or other basis (do not reduce by depreciation)	
Sales Expense		Valuation Method	
Total Gain (Loss)		Accumulation Depreciation	

Form 990-PF, Page 1, Part I, Line 18

Line 18 Stmt

Taxes	Rev/Exp Book	Net Inv Inc	Adj Net Inc	Charity Disb
Excise Tax on Undistributed Income	1,175.			
4940 tax on investment income	1,127.			
Total	<u>2,302.</u>			

Form 990-PF, Page 1, Part I, Line 23

Line 23 Stmt

Other expenses:	Rev/Exp Book	Net Inv Inc	Adj Net Inc	Charity Disb
Liability insurance	1,013.			1,013.
Newspaper notification	145.			145.
State filing fees	50.			50.
Total	<u>1,208.</u>			<u>1,208.</u>

Form 990-PF, Page 6, Part VIII, Line 1

Information about Officers, Directors, Trustees, Etc.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Person.. <input checked="" type="checkbox"/> Business . <input type="checkbox"/> Josiah Welch P.O. Box 6013	Trustee			
Newburyport MA 01950	2.00	8,650.	0.	0.
Person.. <input checked="" type="checkbox"/> Business . <input type="checkbox"/> James G. Zafris, Jr. 53 Warren Street, Unit 116	Trustee			
Newburyport MA 01950	2.00	8,650.	0.	0.
Person.. <input checked="" type="checkbox"/> Business . <input type="checkbox"/> Honorable Donna Holaday C/O City Hall Newburyport MA 01950	Trustee			
	2.00	5,900.	0.	0.

Total

23,200. 0. 0.

Form 990-PF, Page 1, Part I

Line 16a - Legal Fees

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Connelly & Connelly	General counsel	2,395.			2,395.

Form 990-PF, Page 1, Part I

Continued

Line 16a - Legal Fees

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Total		2,395.			2,395.

Form 990-PF, Page 1, Part I

Line 16b - Accounting Fees

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Anna Makos	Bookkeeping	6,500.	0.		6,500.
Fritz DeGuglielmo LLC	Accounting fees	3,145.	1,573.		1,572.
Total		9,645.	1,573.		8,072.

Form 990-PF, Page 1, Part I

Line 16c - Other Professional Fees

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Seaward Management	Investment Management	25,283.	25,283.		
Ritz Payroll	Payroll Services	61.			61.
Total		25,344.	25,283.		61.

Form 990-PF, Page 2, Part II, Line 10b

L-10b Stmt

Line 10b - Investments - Corporate Stock:		End of Year	
		Book Value	Fair Market Value
See attached statement		1,883,181.	3,040,310.
Total		1,883,181.	3,040,310.

Form 990-PF, Page 2, Part II, Line 10c

L- 10c Stmt

Line 10c - Investments - Corporate Bonds:		End of Year	
		Book Value	Fair Market Value
See attached statement		755,770.	755,452.

Form 990-PF, Page 2, Part II, Line 10c
L- 10c Stmt

Continued

Line 10c - Investments - Corporate Bonds:	End of Year	
	Book Value	Fair Market Value
Total	755,770.	755,452.

Wheelwright Scientific School
Investment Detail
6/30/2017

	Quantity	Market Value	Cost	Unrealized Gain (Loss)
Bonds				
JP Morgan Chase	50,000	50,067.10	49,967.00	100.10
Apple Inc.	50,000	49,821.35	49,014.71	806.64
Pepsico Inc.	50,000	50,506.25	50,292.72	213.53
Oracle Corporation	50,000	50,610.25	50,175.61	434.64
Gilead Sciences	50,000	50,430.15	50,265.81	164.34
Sysco Corp	50,000	50,582.15	50,425.28	156.87
Boeing Co	50,000	50,371.60	50,816.77	(445.17)
McDonalds Corp	50,000	50,311.80	50,690.05	(378.25)
Praxair Inc.	50,000	50,111.40	50,444.48	(333.08)
Abbott Laborator	100,000	99,261.00	99,999.00	(738.00)
United Tech Corp	50,000	51,612.90	50,854.93	757.97
United Health	50,000	50,620.40	51,231.63	(611.23)
Thermo Fisher Scientific	50,000	50,479.60	50,897.30	(417.70)
Visa Inc.	50,000	50,666.35	50,694.72	(28.37)
	750,000.00	755,452.30	755,770.01	(317.71)

Equities

Abbott Laboratories	1,950	94,789.50	86,708.33	8,081.17
Alphabet Inc	100	92,968.00	28,688.00	64,280.00
Alphabet Inc	100	90,873.00	28,516.41	62,356.59
Amazon Com Inc.	50	48,400.00	27,596.34	20,803.66
Apple Inc.	1,300	187,226.00	55,144.01	132,081.99
Bank of America Corp	4,500	109,170.00	76,382.55	32,787.45
BHP Billiton	500	17,795.00	19,442.46	(1,647.46)
Boston Scientific Co	2,200	60,984.00	60,538.83	445.17
Broadcom Ltd	550	128,177.50	20,259.38	107,918.12
Capital One Financial Corp	1,000	82,620.00	57,248.86	25,371.14
Cognizant Tech Solutions	1,500	99,600.00	57,890.20	41,709.80
Deere & Co.	650	80,333.50	50,338.00	29,995.50
Diageo Plc	425	50,927.75	52,604.40	(1,676.65)
Emerson Electric	925	55,148.50	52,866.58	2,281.92
EOG Resources Inc,	400	36,208.00	35,186.55	1,021.45
Exxon Mobil	800	64,584.00	30,894.00	33,690.00
Facebook CL A	700	105,686.00	74,816.40	30,869.60
Gilead Sciences	530	37,513.40	12,234.49	25,278.91
Goldman Sachs	375	83,212.50	54,420.89	28,791.61
Home Depot Inc	550	84,370.00	62,238.15	22,131.85
Iberiabank Corp	400	32,600.00	26,771.75	5,828.25
Invesco	1,700	59,823.00	56,085.54	3,737.46
Johnson & Johnson	800	105,832.00	44,512.00	61,320.00

Wheelwright Scientific School
Investment Detail
6/30/2017

	Quantity	Market Value	Cost	Unrealized Gain (Loss)
J P Morgan	1,000	91,400.00	42,046.90	49,353.10
Mondelez Intl	1,650	71,263.50	44,955.87	26,307.63
Occidental Petrol Co	725	43,405.75	55,745.21	(12,339.46)
Oracle Corp	2,150	107,801.00	26,122.50	81,678.50
Pepsico	700	80,843.00	20,411.27	60,431.73
Pfizer Incorporated	2,800	94,052.00	85,257.35	8,794.65
Priceline Group	50	93,526.00	34,584.71	58,941.29
Salesforce Com: CRM	780	67,548.00	33,012.45	34,535.55
Schlumberger	750	49,380.00	65,487.50	(16,107.50)
Siemens A G ADR	950	65,692.50	59,020.81	6,671.69
SVB Financial Group	200	35,158.00	28,556.77	6,601.23
Thermo Fisher	600	104,682.00	24,832.24	79,849.76
TJX Companies	725	52,323.25	49,914.04	2,409.21
United Parcel Service	575	63,589.25	61,616.12	1,973.13
United Technologies	600	73,266.00	39,956.33	33,309.67
Wal-Mart Stores Inc	975	73,788.00	73,497.92	290.08
Walt Disney Co	600	63,750.00	66,778.57	(3,028.57)
		<u>3,040,309.90</u>	<u>1,883,180.68</u>	<u>1,157,129.22</u>
Total		<u>3,795,762.20</u>	<u>2,638,950.69</u>	<u>1,156,811.51</u>

Wheelwright Scientific School
Summary of Realized Gains and Losses
FY2017

Stock	Date Sold	Date Acquired	ST/LT	Sales Price	Cost	Gain/(Loss)
Illinois Tool Works	7/20/2016	1/1/1950	LT	79,839.85	39,418.19	40,421.66
Chevron Corporation	8/31/2016	4/4/2014	LT	50,040.04	59,402.95	(9,362.91)
Prudential Financial	9/14/2016	2/25/2014	LT	47,495.67	50,477.35	(2,981.68)
Broadcom LTD	9/15/2016	7/30/2013	LT	9,490.44	2,025.94	7,464.50
JPMorgan Chase	9/15/2016	7/17/2013	LT	33,410.32	27,686.45	5,723.87
Mondelez Intl.	9/15/2016	1/10/2013	LT	15,030.22	9,536.09	5,494.13
Becton Dickinson	11/8/2016	4/25/2013	LT	50,000.00	50,000.00	-
Home Depot Inc.	11/14/2016	8/1/2014	LT	50,511.00	50,072.65	438.35
United Technologies	12/1/2016	1/20/2009	LT	104,371.51	100,794.25	3,577.26
Mondelez Intl.	12/16/2016	4/29/2014	LT	50,968.00	50,065.50	902.50
McKesson Corp	2/2/2017	12/15/2042	LT	31,133.66	54,241.02	(23,107.36)
Mednax Inc.	2/2/2017	6/21/2012	LT	47,581.12	22,363.45	25,217.67
21st Century Fox	2/2/2017	Various	LT	65,915.54	68,347.64	(2,432.10)
Goldman Sachs	3/15/2017	Various	LT	18,485.16	11,612.96	6,872.20
CVS Health Corp	4/21/2017	6/11/2015	LT	45,616.02	58,921.27	(13,305.25)
Apple Inc.	4/28/2017	Various	LT	28,730.42	12,751.16	15,979.26
Siemens A G	4/28/2017	1/2/2017	LT	14,369.74	13,557.29	812.45
United Technologies	4/28/2017	4/22/2008	LT	23,864.53	14,323.38	9,541.15
Qualcomm Inc.	5/5/2017	Various	LT	60,326.42	54,762.25	5,564.17
Roche Holding A G	6/5/2017	Various	LT	65,257.63	44,652.90	20,604.73
Verizon Comm	6/22/2017	Various	LT	102,035.96	107,874.83	(5,838.87)
				994,473.25	902,887.52	91,585.73
CVS Health Corp	4/21/2017	9/15/2016	ST	9,916.52	11,262.70	(1,346.18)
				9,916.52	11,262.70	(1,346.18)
Totals				1,004,389.77	914,150.22	90,239.55

APPLICATION TO THE TRUSTEES
OF THE
WHEELWRIGHT SCIENTIFIC SCHOOL

Student's Name _____ Social Security # _____

Address _____

Date of Birth _____ Home phone _____ Cell phone _____

E-mail address _____

Name and address of parents or guardian _____

I respectfully make application for assistance to obtain a Scientific Education at:

Name and address of University: _____

I desire to attend the above-named University for the following reasons: _____

My major will be: _____

Educational Expenses:	Tuition:	\$ _____
	Room and Board	\$ _____
	Books, materials, etc.	\$ _____
	Total	\$ _____

Please attach a copy of your High School Transcript

I am a Protestant as understood by that term, and attend the _____

Church of which I am () am not () a member.

In preparing for college, I attended the following school _____

of which _____ is principal.

List names and amounts of scholarships or grants that you will be applying for or have already received:

unk

on
ie

I submit the following three names of people who have provided written letters of reference on my behalf. One of the references must be the minister of the church which you attend.

#1 _____ #2 _____ #3 _____

Please attach and return the 3 written references along with this application.

In making this application, I agree that, if accepted as a beneficiary of the Wheelwright Scientific School, I will pursue a course in engineering or the basic sciences; that I will notify the Secretary of the Wheelwright Scientific School at the end of each college year of my final grades or markings for the year, and furnish the Secretary with a list of my studies for the coming year; and that I will notify said Secretary promptly of any changes in my courses of study that in any way may diminish the emphasis on science. I understand and agree that any failure on my part to comply with either or all of the foregoing requirements will mean automatic cancellation of the Wheelwright Scholarship. I understand that the tuition payment for the upcoming semester is paid only after the Secretary receives a bill for tuition and a transcript of grades for the previous semester.

Signature of Applicant _____ Date _____

Part 2 – to be completed by the Principal or Headmaster

Will you please give the standing of _____ while at your school, as to:

Character _____

Scholarship (average rank by years) _____

General Department _____

Do you regard him as deserving and meritorious? _____

Signature _____

Important Notice

This application must be completed in detail by the applicant and must be returned to the Clerk of the Wheelwright Scientific School before April 20, 2011 at 81 State Street, Newburyport, MA 01950 in order to receive consideration.

CHECKLIST:

- COMPLETED APPLICATION
- COPY OF HIGH SCHOOL TRANSCRIPT
- THREE (3) LETTERS OF REFERENCE INCLUDING 1 FROM YOUR MINISTER