

EXTENDED TO MAY 15, 2018

## Return of Private Foundation

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

2949136400314 7

OMB No 1545-0052

2016

Open to Public Inspection

Form 990-PF

Department of the Treasury  
Internal Revenue Service► Do not enter social security numbers on this form as it may be made public.  
► Information about Form 990-PF and its separate instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf)

For calendar year 2016 or tax year beginning

JUL 1, 2016

, and ending

JUN 30, 2017

Name of foundation

THE JULIA & SEYMOUR GROSS  
FOUNDATION, INC.

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

PO BOX 506

A Employer identification number

13-6122092

B Telephone number

781 237-2544

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

WESTON, MA 02493-0003

G Check all that apply:  Initial return  Initial return of a former public charity  
 Final return  Amended return  
 Address change  Name changeH Check type of organization:  Section 501(c)(3) exempt private foundation  
 Section 4947(a)(1) nonexempt charitable trust  Other taxable private foundationI Fair market value of all assets at end of year J Accounting method:  Cash  Accrual  
(from Part II, col (c), line 16)  Other (specify) *\$ 6,039,201.* (Part I, column (d) must be on cash basis)C If exemption application is pending, check here ► *6*

D 1. Foreign organizations, check here ►

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

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

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))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check ► <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B Interest on savings and temporary cash investments					
3		45.	45.		STATEMENT 1
4 Dividends and interest from securities		120,375.	120,375.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		201,921.			
b Gross sales price for all assets on line 6a		3,183,649.			
7 Capital gain net income (from Part IV, line 2)			201,921.		
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)					
11 Other income					
12 Total Add lines 1 through 11		322,341.	322,341.		
13 Compensation of officers, directors, trustees, etc		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees	STMT 3	13,526.	0.		13,526.
c Other professional fees	STMT 4	28,194.	28,194.		0.
17 Interest					
18 Taxes					
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings		388.	0.		388.
22 Printing and publications					
23 Other expenses	STMT 5	3,822.	0.		3,822.
24 Total operating and administrative expenses Add lines 13 through 23		45,930.	28,194.		17,736.
25 Contributions, gifts, grants paid		39,350.			39,350.
26 Total expenses and disbursements Add lines 24 and 25		85,280.	28,194.		57,086.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		237,061.			
b Net investment income (if negative, enter -0-)			294,147.		
c Adjusted net income (if negative, enter -0-)				N/A	

THE JULIA & SEYMOUR GROSS  
FOUNDATION, INC.

Form 990-PF (2016)

13-6122092

Page 2

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
1	Cash - non-interest-bearing				
2	Savings and temporary cash investments		57,332.	733,064.	733,064.
3	Accounts receivable ►				
	Less: allowance for doubtful accounts ►				
4	Pledges receivable ►				
	Less: allowance for doubtful accounts ►				
5	Grants receivable				
6	Receivables due from officers, directors, trustees, and other disqualified persons				
7	Other notes and loans receivable ►				
	Less: allowance for doubtful accounts ►				
8	Inventories for sale or use				
9	Prepaid expenses and deferred charges				
10a	Investments - U.S. and state government obligations	STMT 6	1,320,700.	1,013,187.	1,017,415.
b	Investments - corporate stock	STMT 7	2,635,312.	2,273,555.	4,094,912.
c	Investments - corporate bonds				
11	Investments - land, buildings and equipment basis ►				
	Less accumulated depreciation ►				
12	Investments - mortgage loans				
13	Investments - other	STMT 8	0.	230,599.	193,810.
14	Land, buildings, and equipment: basis ►				
	Less accumulated depreciation ►				
15	Other assets (describe ►)				
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		4,013,344.	4,250,405.	6,039,201.
17	Accounts payable and accrued expenses				
18	Grants payable				
19	Deferred revenue				
20	Loans from officers, directors, trustees, and other disqualified persons				
21	Mortgages and other notes payable				
22	Other liabilities (describe ►)				
23	Total liabilities (add lines 17 through 22)		0.	0.	
	Foundations that follow SFAS 117, check here ► <input checked="" type="checkbox"/>				
	and complete lines 24 through 26 and lines 30 and 31				
24	Unrestricted		4,013,344.	4,250,405.	
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		4,013,344.	4,250,405.	
31	Total liabilities and net assets/fund balances		4,013,344.	4,250,405.	

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	4,013,344.
2	Enter amount from Part I, line 27a	2	237,061.
3	Other increases not included in line 2 (itemize) ►	3	0.
4	Add lines 1, 2, and 3	4	4,250,405.
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	4,250,405.

Form 990-PF (2016)

THE JULIA & SEYMOUR GROSS  
FOUNDATION, INC.

Form 990-PF (2016)

13-6122092

Page 3

**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.)
<b>1a PUBLICLY TRADED SECURITIES</b>			<b>P</b>		
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 3,183,649.		2,981,728.	201,921.		
b					
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			201,921.		
b					
c					
d					
e					
2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2	201,921.	
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). If (loss), enter -0- in Part I, line 8	{ }		3	N/A	

**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	768,599.	5,706,307.	.134693
2014	186,470.	6,220,261.	.029978
2013	424,742.	6,083,491.	.069819
2012	303,314.	5,610,606.	.054061
2011	408,953.	5,350,827.	.076428

2 Total of line 1, column (d)

2 .364979

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 .072996

4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5

4 5,673,042.

5 Multiply line 4 by line 3

5 414,109.

6 Enter 1% of net investment income (1% of Part I, line 27b)

6 2,941.

7 Add lines 5 and 6

7 417,050.

8 Enter qualifying distributions from Part XII, line 4

8 57,086.

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.

THE JULIA & SEYMOUR GROSS  
FOUNDATION, INC.

Form 990-PF (2016)

13-6122092

Page 4

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

1a Exempt operating foundations described in section 4940(d)(2), check here ►  and enter "N/A" on line 1.

Date of ruling or determination letter: \_\_\_\_\_ (attach copy of letter if necessary-see instructions)

b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ►  and enter 1% of Part I, line 27b

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-)

3 Add lines 1 and 2

4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

5 **Tax based on investment income** Subtract line 4 from line 3. If zero or less, enter -0-

6 Credits/Payments.

a 2016 estimated tax payments and 2015 overpayment credited to 2016

6a 12,585.

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 12,585.

8 Enter any **penalty** for underpayment of estimated tax. Check here  if Form 2220 is attached

8

9 Tax due If the total of lines 5 and 8 is more than line 7, enter **amount owed**

9

10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid**

10 6,702.

11 Enter the amount of line 10 to be: **Credited to 2017 estimated tax** ►

6,702. | Refunded ►

11 0.

**Part VII-A Statements Regarding Activities**

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?

Yes  No

1a X

b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)?

1b X

If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities

c Did the foundation file Form 1120-POL for this year?

1c X

d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:

(1) On the foundation ► \$ 0. (2) On foundation managers. ► \$ 0.

e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ 0.

2 Has the foundation engaged in any activities that have not previously been reported to the IRS?

2 X

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

3 X

4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

4a X

b If "Yes," has it filed a tax return on Form 990-T for this year?

4b X

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?

5 X

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:

N/A

• 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 X

7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV

7 X

8a Enter the states to which the foundation reports or with which it is registered (see instructions) ►

8b X

NY

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

9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? If "Yes," complete Part XIV

9 X

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

10 X

Form 990-PF (2016)

2

THE JULIA & SEYMOUR GROSS  
FOUNDATION, INC.

Form 990-PF (2016)

13-6122092

Page 5

**Part VII-A Statements Regarding Activities (continued)**

	Yes	No
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	X
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	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <b>NONE</b>	13	X
14 The books are in care of ► <b>JANE R. CLARK, MD</b> Telephone no. ► <b>781 237-2544</b> Located at ► <b>PO BOX 506, WESTON, MA</b> ZIP+4 ► <b>02493-0003</b>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A
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? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	16	Yes X

**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.

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes	X No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes	X No
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	X Yes	<input type="checkbox"/> No
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	X 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	X 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	X No
b If any answer is "Yes" to 1a(1)-(6), did <b>any</b> 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)? Organizations relying on a current notice regarding disaster assistance check here ►	1b	X
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	X
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? If "Yes," list the years ►	<input type="checkbox"/> Yes	X No
b Are there any years listed in 2a for which the foundation is <b>not</b> 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 <b>all</b> years listed, answer "No" and attach statement - see instructions.)	2b	N/A
c If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here. ►	3a	
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	X 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	N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2016?	4b	X

Form 990-PF (2016)

THE JULIA & SEYMOUR GROSS  
FOUNDATION, INC.

Form 990-PF (2016)

13-6122092

Page 6

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

5a During the year did the foundation pay or incur any amount to:

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?
- (3) Provide a grant to an individual for travel, study, or other similar purposes?
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions)
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

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)?

Organizations relying on a current notice regarding disaster assistance check here ►

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

**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.

(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
SEE STATEMENT 9		0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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

► 0

Form 990-PF (2016)

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services ►

0

**Part IX-A** Summary of Direct Charitable Activities

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

Expenses

1	N/A	
2		
3		
4		

**Part IX-B** Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

Amount

1	N/A	
2		
3	All other program-related investments. See instructions.	

Total. Add lines 1 through 3 ►

0.

THE JULIA & SEYMOUR GROSS  
FOUNDATION, INC.

Form 990-PF (2016)

13-6122092

Page 8

**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 5,546,699.
b	Average of monthly cash balances	1b 212,735.
c	Fair market value of all other assets	1c
d	<b>Total</b> (add lines 1a, b, and c)	1d 5,759,434.
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 5,759,434.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4 86,392.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5 5,673,042.
6	<b>Minimum investment return</b> Enter 5% of line 5	6 283,652.

**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	1 283,652.
2a	Tax on investment income for 2016 from Part VI, line 5	2a 5,883.
b	Income tax for 2016. (This does not include the tax from Part VI.)	2b
c	Add lines 2a and 2b	2c 5,883.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3 277,769.
4	Recoveries of amounts treated as qualifying distributions	4 0.
5	Add lines 3 and 4	5 277,769.
6	Deduction from distributable amount (see instructions)	6 0.
7	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7 277,769.

**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 57,086.
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	<b>Qualifying distributions</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4 57,086.
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	5 0.
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6 57,086.

**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.

Form 990-PF (2016)

THE JULIA & SEYMOUR GROSS  
FOUNDATION, INC.

Form 990-PF (2016)

13-6122092

Page 9

**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				277,769.
2 Undistributed income, if any, as of the end of 2016			0.	
a Enter amount for 2015 only				
b Total for prior years.		0.		
3 Excess distributions carryover, if any, to 2016.				
a From 2011	23,736.			
b From 2012	30,268.			
c From 2013	124,841.			
d From 2014				
e From 2015	486,446.			
f Total of lines 3a through e	665,291.			
4 Qualifying distributions for 2016 from Part XII, line 4: ► \$ 57,086.			0.	
a Applied to 2015, but not more than line 2a				
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				57,086.
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))	220,683.			220,683.
6 Enter the net total of each column as indicated below:	444,608.			
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 instr.			0.	
f Undistributed income for 2016. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2017			0.	
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)				0.
8 Excess distributions carryover from 2011 not applied on line 5 or line 7		0.		
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	444,608.			
10 Analysis of line 9:				
a Excess from 2012				
b Excess from 2013				
c Excess from 2014				
d Excess from 2015	444,608.			
e Excess from 2016				



THE JULIA & SEYMOUR GROSS  
FOUNDATION, INC.

Form 990-PF (2016)

13-6122092 Page 11

**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
<b>a Paid during the year</b>				
AMERICAN FOR REFUGEES IN CRISIS 273 UPLAND RD CAMBRIGE, MA 02140	N/A	PC	GENERAL	500.
ANJALI HOUSE US INC. 54 BLUEBERRY RIDGE LN CHILMARK, MA 02535	N/A	PC	GENERAL	3,500.
BELMONT HILL SCHOOL 350 PROSPECT ST BELMONT, MA 02478	N/A	PC	GENERAL	1,000.
BOSTON DAY AND EVENING ACADEMY FOUNDATION INC. 20 KEARSAGE AVE ROXBURY, MA 02119	N/A	PC	GENERAL	250.
BOSTON YOUTH SYMPHONY ORCHESTRAS, INC 855 COMMONWEALTH AVE BOSTON, MA 02215	N/A	PC	GENERAL	2,500.
<b>Total</b>	<b>SEE CONTINUATION SHEET(S)</b>			► 3a 39,350.
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>				► 3b 0.

Form 990-PF (2016)

## 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
	(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 45.	
4 Dividends and interest from securities			14	120,375.	
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	201,921.	
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.		322,341.	0.
13 Total Add line 12, columns (b), (d), and (e)				13	322,341.

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



THE JULIA & SEYMOUR GROSS  
FOUNDATION, INC.

13-6122092

Part XV | Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
BUZZARDS BAY COALITION, INC. 114 FRONT ST NEW BEDFORD, MA 02740	N/A	PC	WESTPORT AWARENESS EVENT	4,000.
COLUMBIA UNIVERSITY PO BOX 1383 NEW YORK, NY 10277	N/A	PC	P&S ALUMNI FUND	1,000.
DARTMOUTH COLLEGE D-H GEISEL OFFICE OF DEVELOPMENT, 1 MEDICAL CENTER DR LEBANON, NH 03756	N/A	PC	GENERAL	1,000.
FRACTURED ATLAS, INC. 248 W 35TH ST. 10TH FL NEW YORK, NY 10001	N/A	PC	ENSEMBLE MUSICA HUMANA	2,000.
HARVARD UNIVERSITY 124 MOUNT AUBURN ST CAMBRIDGE, MA 02138	N/A	PC	HARVARD CAMBRIDGE FELLOWSHIP	1,000.
JOSLIN DIABETES CENTER, INC. ONE JOSLIN PLACE BOSTON, MA 02215	N/A	PC	TEAM JOSLIN BOSTON MARATHON RUN	1,000.
LAND'S SAKE, INC. 27 CRESCENT ST WESTON, MA 02493	N/A	PC	GENERAL	1,000.
LEUKEMIA AND LYMPHOMA SOCIETY MASSACHUSETTS CHAPTER 9 ERIE DR, STE 101 NATICK, MA 01760	N/A	PC	THE MAN & WOMAN OF THE YEAR CAMPAIGN	250.
MASSACHUSETTS GENERAL HOSPITAL 125 NASHUA ST, FIFTH FL BOSTON, MA 02114	N/A	PC	PAUL DUDLEY WHITE SOCIETY CENTENNIAL FELLOW'S FUND	500.
MASSACHUSETTS INSTITUTE OF TECH 600 MEMORIAL DR W98-200, 2ND FL CAMBRIDGE, MA 02139	N/A	PC	MEREDITH KAMM FUND	5,000.
<b>Total from continuation sheets</b>				<b>31,600.</b>

THE JULIA & SEYMOUR GROSS  
FOUNDATION, INC.

13-6122092

**Part XV** **Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
MOTHERS AGAINST SENSELESS KILLINGS 5044 S. MICHIGAN AVE, APT. 1N CHICAGO, IL 60615	N/A	PC	GENERAL	500.
MUSEUM OF SCIENCE 1 SCIENCE PARK BOSTON, MA 02114	N/A	PC	GENERAL	500.
NORTHEAST HIGH PERFORMANCE ROWING FOUNDATION INC 21 LAKE LILLINONAH RD NORTH BRIDGEWATER, CT 06752	N/A	PC	SUPPORTING CICELY MADDEN IN U23 WORLD ROWING CHAMPIONSHIPS	1,000.
ONE ELEUTHERA FOUNDATION 103 DUMBARTON CT CARY, NC 27511	N/A	PC	GENERAL	1,500.
OPERA BUFFS 37 E. HUNTINGTON DR ARCADIA, CA 91006	N/A	PC	GENERAL	1,000.
PAN MASSACHUSETTS CHALLENGE TRUST 77 4TH AVE NEEDHAM, MA 02494	N/A	PC	GENERAL	750.
RADCLIFFE INSTITUTE FOR ADVANCED STUDY 124 MOUNT AUBURN ST CAMBRIDGE, MA 02138	N/A	PC	GENERAL	1,000.
SIGNET SOCIETY 46 DUNSTER ST CAMBRIDGE, MA 02138	N/A	PC	GENERAL	500.
SQUASHBUSTERS, INC. 795 COLUMBUS AVE ROXBURY CROSSING, MA 02120	N/A	PC	DERBY	5,000.
THE AMERICAN CANCER SOCIETY 250 WILLIAMS ST NW ATLANTA, GA 30303	N/A	PC	GENERAL	100.
<b>Total from continuation sheets</b>				

THE JULIA & SEYMOUR GROSS  
FOUNDATION, INC.

13-6122092

## Part XV      Supplementary Information

### 3 Grants and Contributions Paid During the Year (Continuation)

**Total from continuation sheets**

## FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
CHECKING ACCOUNT	29.	29.	
MONEY MARKET FUNDS	16.	16.	
TOTAL TO PART I, LINE 3	45.	45.	

## FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
PUBLICLY TRADED SECURITIES	120,375.	0.	120,375.	120,375.	
TO PART I, LINE 4	120,375.	0.	120,375.	120,375.	

## FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
COMPILED AND RETURN PREPARATION	13,526.	0.		13,526.
TO FORM 990-PF, PG 1, LN 16B	13,526.	0.		13,526.

## FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT ADVISORY FEES	28,194.	28,194.		0.
TO FORM 990-PF, PG 1, LN 16C	28,194.	28,194.		0.

## FORM 990-PF

## OTHER EXPENSES

## STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OFFICE EXPENSES	2,672.	0.		2,672.
DUES AND SUBSCRIPTIONS	900.	0.		900.
FILING FEES	250.	0.		250.
TO FORM 990-PF, PG 1, LN 23	3,822.	0.		3,822.

## FORM 990-PF

## U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS

## STATEMENT 6

DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
UNITED STATES TREASURY BILL, CUSIP 912796KR9	X		995,452.	997,100.
GNMA PL#003345M 5.0% DUE 2/20/33	X		5,354.	5,138.
GNMA PL#003247M 5.0% DUE 6/20/32	X		886.	3,089.
GNMA PL#003259M 5.5% DUE 7/20/32	X		4,204.	5,084.
GNMA PL#590122X 6.0% DUE 5/15/32	X		2,007.	4,259.
GNMA PL#003249M 6.0% DUE 6/20/32	X		3,007.	1,975.
GNMA PL#586596X 6.5% DUE 6/15/32	X		2,277.	770.
TOTAL U.S. GOVERNMENT OBLIGATIONS			1,013,187.	1,017,415.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			1,013,187.	1,017,415.

FORM 990-PF

CORPORATE STOCK

STATEMENT 7

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
3M COMPANY (700 SHARES)	57,425.	145,733.
ALPHABET INC. CLASS A (100 SHARES)	40,686.	92,968.
ALPHABET INC. CLASS C (99.794 SHARES)	37,643.	90,873.
APPLE INC (1700 SHARES)	60,683.	244,834.
BANK OF NEW YORK MELLON CORP. (2000 SHARES)	80,167.	102,040.
BERKSHIRE HATHAWAY INC. CL. B (2500 SHARES)	121,196.	423,425.
DU PONT EL DE NEMOURS & CO. (1000 SHARES)	41,539.	80,710.
EXXON MOBIL CORP (2000 SHARES)	135,860.	161,460.
GENERAL ELECTRIC CO. (2000 SHARES)	37,219.	54,020.
GREAT PLAINS (1000 SHARES)	23,859.	29,280.
INTEL CORP (2000 SHARES)	48,998.	67,480.
INTERNATIONAL PAPER CO. (2000 SHARES)	62,934.	113,220.
JPMORGAN CHASE & CO. (2000 SHARES)	128,034.	182,800.
MERCK & CO INC NEW COM (1500 SHARES)	67,834.	96,135.
METLIFE INCORPORATED (4000 SHARES)	180,060.	219,760.
MICROSOFT CORP (2500 SHARES)	65,549.	172,325.
NATIONAL GRID PLC SPON ADR (916 SHARES)	43,209.	57,543.
NESTLE S A SPONSORED ADR (2000 SHARES)	109,755.	174,400.
NEXTERA ENERGY INC (2000 SHARES)	131,773.	280,260.
PHILLIPS 66 (2000 SHARES)	118,467.	165,380.
PPG INDUSTRIES INC. (1200 SHARES)	36,133.	131,952.
PROCTER & GAMBLE CO. (1000 SHARES)	52,907.	87,150.
SCHLUMBERGER LTD (1500 SHARES)	120,567.	98,760.
TEXAS INSTRUMENTS (1000 SHARES)	30,839.	76,930.
TRAVELERS COMPANIES INC. (800 SHARES)	39,400.	101,224.
UNITEDHEALTH GP INC. (500 SHARES)	35,640.	92,710.
WALT DISNEY CO (2000 SHARES)	66,078.	212,500.
WISCONSIN ENERGY CORP. (1000 SHARES)	42,711.	61,380.
ZOETIS INC CLASS-A (1000 SHARES)	49,179.	62,380.
JP MORGAN CHASE & CO 5.5%-0 (3000 SHARES)	76,199.	76,980.
WELLS FARGO 5.85-Q FIXD-TO-FLT (WFC.Q) (5000 SHARES)	131,012.	138,300.
TOTAL TO FORM 990-PF, PART II, LINE 10B	2,273,555.	4,094,912.

FORM 990-PF

OTHER INVESTMENTS

STATEMENT 8

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
CLEARBRIDGE ENERGY MLP FD INC (5000 SHARES)	COST	119,539.	76,300.
ISHARES S&P US PFD STK IDX FD (3000 SHARES)	COST	111,060.	117,510.
TOTAL TO FORM 990-PF, PART II, LINE 13		230,599.	193,810.

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS  
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 9

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
JANE R. CLARK, MD PO BOX 506 WESTON, MA 02493-0003	PRESIDENT, EXECUTIVE DIRECTOR 21.00	0.	0.	0.
CLARK CHESSIN GERTLER PO BOX 506 WESTON, MA 02493-0003	VICE PRESIDENT 5.00	0.	0.	0.
CHARLES GARRISON GERTLER PO BOX 506 WESTON, MA 02493-0003	TREASURER 1.00	0.	0.	0.
JONATHAN P. GERTLER, MD PO BOX 506 WESTON, MA 02493-0003	SECRETARY 5.00	0.	0.	0.
ROGER D. KAMM, PHD PO BOX 506 WESTON, MA 02493-0003	BOARD MEMBER 0.50	0.	0.	0.
WILLIAM R. GERTLER PO BOX 506 WESTON, MA 02493-0003	BOARD MEMBER 1.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.