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

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

EDWARD S & WINIFRED G MOSELEY FOUNDATION

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

SEAWARD MGMT LP, 265 FRANKLIN ST 20FL

Room/suite

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

BOSTON, MA 02110-3199

G Check all that apply:

☐

Initial return

☐

Initial return of a former public charity

☐

Final return

☐

Amended return

☐

Address change

☐

Name change

H Check type of organization:

☒

Section 501(c)(3) exempt private foundation

☐

Section 4947(a)(1) nonexempt charitable trust

☐

Other taxable private foundation

I Fair market value of all assets at end of year

(from Part II, col (c), line 16)

\$ 21,318,946. (Part I, column (d) must be on cash basis.)

J Accounting method:

☒

Cash

☐

Accrual

Other (specify)

A Employer identification number

74-3201002

B Telephone number

617-224-1900

C If exemption application is pending, check here ☐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

2 Check ☒ if the foundation is not required to attach Sch B

3 Interest on savings and temporary cash investments

4 Dividends and interest from securities

435,334.

435,334.

STATEMENT 1

5a Gross rents

b Net rental income or (loss)

6a Net gain or (loss) from sale of assets not on line 10

299,232.

b Gross sales price for all assets on line 6a

4,019,382.

7 Capital gain net income (from Part IV, line 2)

299,232.

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

734,566.

734,566.

13 Compensation of officers, directors, trustees, etc

20,000.

0.

20,000.

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees

b Accounting fees

STMT 2

4,150.

2,780.

1,370.

c Other professional fees

STMT 3

100,996.

69,575.

31,421.

17 Interest

18 Taxes

STMT 4

3,924.

3,924.

0.

19 Depreciation and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses

STMT 5

402.

277.

0.

24 Total operating and administrative expenses Add lines 13 through 23

129,472.

76,556.

52,791.

25 Contributions, gifts, grants paid

1,136,750.

1,136,750.

26 Total expenses and disbursements. Add lines 24 and 25

1,266,222.

76,556.

1,189,541.

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

-531,656.

b Net investment income (if negative, enter -0-)

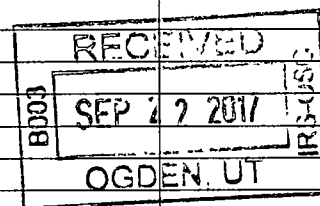
658,010.

c Adjusted net income (if negative, enter -0-)

N/A

SCANNED SEP 25 2017

Operating and Administrative Expenses



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 |
| Assets | 1 Cash - non-interest-bearing | | | |
| | 2 Savings and temporary cash investments | 266,320. | 1,130,025. | 1,130,025. |
| | 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 | | | |
| | b Investments - corporate stock STMT 7 | 12,484,128. | 11,340,728. | 17,653,372. |
| | c Investments - corporate bonds STMT 8 | 2,379,825. | 2,123,977. | 2,120,189. |
| | 11 Investments - land, buildings, and equipment basis ▶ | | | |
| Less: accumulated depreciation ▶ | | | | |
| 12 Investments - mortgage loans | | | | |
| 13 Investments - other STMT 9 | 408,240. | 412,127. | 415,360. | |
| 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) | 15,538,513. | 15,006,857. | 21,318,946. | |
| 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 | | | |
| | 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 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 | 17,302,381. | 17,302,381. | |
| | 28 Paid-in or capital surplus, or land, bldg., and equipment fund | 0. | 0. | |
| 29 Retained earnings, accumulated income, endowment, or other funds | -1,763,868. | -2,295,524. | | |
| 30 Total net assets or fund balances | 15,538,513. | 15,006,857. | | |
| 31 Total liabilities and net assets/fund balances | 15,538,513. | 15,006,857. | | |

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 | 15,538,513. |
| 2 Enter amount from Part I, line 27a | 2 | -531,656. |
| 3 Other increases not included in line 2 (itemize) ▶ | 3 | 0. |
| 4 Add lines 1, 2, and 3 | 4 | 15,006,857. |
| 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 | 15,006,857. |

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 | | | | |
| b SEE ATTACHED STATEMENTS | | | | |
| 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 | | | |
| b | | | |
| c | | | |
| d | | | |
| e 4,019,382. | | 3,720,150. | 299,232. |

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

| (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 | (l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h)) |
|---------------------------|--------------------------------------|-------------------------------------------------|-------------------------------------------------------------------------------------------------|
| a | | | |
| b | | | |
| c | | | |
| d | | | |
| e | | | 299,232. |

| | | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|----------|-----------------|
| 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 | 299,232. |
| 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 | 1,133,180. | 19,886,125. | .056983 |
| 2014 | 1,055,920. | 21,147,818. | .049930 |
| 2013 | 1,076,183. | 20,018,561. | .053759 |
| 2012 | 886,101. | 18,226,823. | .048615 |
| 2011 | 910,182. | 17,298,697. | .052616 |

| | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|--------------------|
| 2 Total of line 1, column (d) | 2 | .261903 |
| 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 | .052381 |
| 4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5 | 4 | 20,475,040. |
| 5 Multiply line 4 by line 3 | 5 | 1,072,503. |
| 6 Enter 1% of net investment income (1% of Part I, line 27b) | 6 | 6,580. |
| 7 Add lines 5 and 6 | 7 | 1,079,083. |
| 8 Enter qualifying distributions from Part XII, line 4 | 8 | 1,189,541. |

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

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

| | | | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|---------|--------|
| 1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions) | | | |
| b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b | | 1 | 6,580. |
| 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 | 6,580. |
| 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 | 6,580. |
| 6 Credits/Payments: | | | |
| a 2016 estimated tax payments and 2015 overpayment credited to 2016 | 6a | 11,382. | |
| 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 | 11,382. | |
| 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 | | |
| 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid | 10 | 4,802. | |
| 11 Enter the amount of line 10 to be: Credited to 2017 estimated tax <input checked="" type="checkbox"/> Refunded <input type="checkbox"/> | 11 | 0. | |

Part VII-A Statements Regarding Activities

| | | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|------------|-----------|
| | | Yes | No |
| 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? | 1a | | X |
| b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? 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. | 1b | | X |
| 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. <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers. <input checked="" 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 checked="" type="checkbox"/> \$ 0. | | | |
| 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities. | 2 | | X |
| 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 | | |
| 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T . | 5 | | X |
| 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 | 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) <input checked="" 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 ? If "No," attach explanation | 8b | X | |
| 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 |

N/A

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) | | 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) | | X |
| 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u> | X | |
| 14 The books are in care of ► <u>C. T. BARROW, SEAWARD MGMT LP</u> Telephone no. ► <u>(617) 224-1900</u> Located at ► <u>265 FRANKLIN ST 20FL, BOSTON, MA</u> ZIP+4 ► <u>02110</u> | | |
| 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 | | <input type="checkbox"/> |
| 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 ► | N/A | 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 <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)? Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/> | 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► _____, _____, _____ b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____, _____, _____ | 2b | |
| 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) N/A | 3b | |
| 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 |

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))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions)

☐ Yes ☒ 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?

☐ Yes ☒ 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)?

N/A

5b

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?

N/A

☐ Yes ☐ No

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?☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

X

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?☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation.

| (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 |
|----------------------------------|-----------------------------------------------------------|-------------------------------------------|-----------------------------------------------------------------------|---------------------------------------|
| CHRISTOPHER T BARROW | TRUSTEE | | | |
| SEAWARD MGMT LP, 265 FRANKLIN ST | | | | |
| BOSTON, MA 02110 | 4.00 | 0. | 0. | 0. |
| ROGER D SCOVILLE | TRUSTEE | | | |
| SEAWARD MGMT LP, 265 FRANKLIN ST | | | | |
| BOSTON, MA 02110 | 2.00 | 0. | 0. | 0. |
| ROBERT G HOWE | TRUSTEE | | | |
| 311 E. MORSE BLVD, #6-21 | | | | |
| WINTER PARK, FL 32789 | 7.50 | 10,000. | 0. | 0. |
| KAY HOWE | TRUSTEE | | | |
| 311 E. MORSE BLVD, #6-21 | | | | |
| WINTER PARK, FL 32789 | 7.50 | 10,000. | 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

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 | 20,033,914. |
| b | Average of monthly cash balances | 1b | 752,929. |
| c | Fair market value of all other assets | 1c | |
| d | Total (add lines 1a, b, and c) | 1d | 20,786,843. |
| 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 | 20,786,843. |
| 4 | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) | 4 | 311,803. |
| 5 | Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5 | 20,475,040. |
| 6 | Minimum investment return. Enter 5% of line 5 | 6 | 1,023,752. |

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 | 1,023,752. |
| 2a | Tax on investment income for 2016 from Part VI, line 5 | 2a | 6,580. |
| b | Income tax for 2016. (This does not include the tax from Part VI.) | 2b | |
| c | Add lines 2a and 2b | 2c | 6,580. |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 | 3 | 1,017,172. |
| 4 | Recoveries of amounts treated as qualifying distributions | 4 | 0. |
| 5 | Add lines 3 and 4 | 5 | 1,017,172. |
| 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 | 1,017,172. |

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 | 1,189,541. |
| 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 | 1,189,541. |
| 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 | 6,580. |
| 6 | Adjusted qualifying distributions. Subtract line 5 from line 4 | 6 | 1,182,961. |

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 | | | | 1,017,172. |
| 2 Undistributed income, if any, as of the end of 2016 | | | | |
| a Enter amount for 2015 only | | | 0. | |
| b Total for prior years: | | 0. | | |
| 3 Excess distributions carryover, if any, to 2016: | | | | |
| a From 2011 | 53,513. | | | |
| b From 2012 | | | | |
| c From 2013 | 95,885. | | | |
| d From 2014 | 56,965. | | | |
| e From 2015 | 157,710. | | | |
| f Total of lines 3a through e | 364,073. | | | |
| 4 Qualifying distributions for 2016 from Part XII, line 4: ▶ \$ 1,189,541. | | | | |
| a Applied to 2015, but not more than line 2a | | | 0. | |
| 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 | | | | 1,017,172. |
| e Remaining amount distributed out of corpus | 172,369. | | | |
| 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 | 536,442. | | | |
| 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 | 53,513. | | | |
| 9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a | 482,929. | | | |
| 10 Analysis of line 9: | | | | |
| a Excess from 2012 | | | | |
| b Excess from 2013 | 95,885. | | | |
| c Excess from 2014 | 56,965. | | | |
| d Excess from 2015 | 157,710. | | | |
| e Excess from 2016 | 172,369. | | | |

N/A

- b** Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(1)(3) or ☐ 4942(1)(5)

- (4) Gross investment income

[illegible]Form **990-PF** (2016)

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

| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------|-------------------------------------------------------|------------------------|
| a Paid during the year | | | | |
| ANDOVER PHILLIPS ACADEMY 180 MAIN STREET ANDOVER, MA 01810 | NONE | 501(C)(3) | ANDOVER BREAD LOAF ABL & PALS | 10,000. |
| ANNA JAKES COMMUNITY HEALTH FOUNDATION 25 HIGHLAND AVENUE NEWBURYPORT, MA 01950 | NONE | 509(C)(3) | BIRTHING CENTER OPERATING ROOM HVAC REPLACEMENT | 40,000. |
| ASPIRATIONS FUND OF KINGSLEY PINES CAMP 51 COUGHLAN COVE ROAD RAYMOND, ME 04071 | NONE | 509(A)(1) | PROMOTING YOUTH DEVELOPMENT IN ESSEX COUNTY | 9,000. |
| BEVERLY BOOTSTRAPS 371 CABOT STREET BEVERLY, MA 01915 | NONE | 501(C)(3) | SUMMER CAMP BACK TO SCHOOL BONANZA | 15,000. |
| BOYS & GIRLS CLUB OF LYNN 25 NORTH COMMON LYNN, MA 01902 | NONE | 501(C)(3) | PROJECT LEARN | 25,000. |
| Total | SEE CONTINUATION SHEET(S) | | | ▶ 3a 1,136,750. |
| b Approved for future payment | | | | |
| NONE | | | | |
| | | | | |
| | | | | |
| | | | | |
| Total | | | ▶ 3b | 0. |

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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 | PFIZER CLASS ACTION PROCEEDS | P | | 12/09/16 |
| b | 250000 JP MORGAN CHASE & CO 3.15% | P | 05/08/12 | 07/05/16 |
| c | 2000 COCA-COLA COMPANY | P | 07/12/06 | 07/28/16 |
| d | 500 THERMO FISHER SCIENTIFIC INC | P | 11/21/12 | 07/28/16 |
| e | 500 3M CO | P | 07/12/06 | 07/28/16 |
| f | 1000 DU PONT E I DE MENOURS | P | 07/12/06 | 07/28/16 |
| g | 1500 COGNIZANT TECH SOLUTNS CL A | P | 04/25/13 | 07/28/16 |
| h | 3584 NOW INC | P | 06/24/14 | 07/28/16 |
| i | 916 NOW INC | P | 06/24/14 | 07/28/16 |
| j | 500 NOW INC | P | 11/21/12 | 07/28/16 |
| k | 750 3M CO | P | 07/12/06 | 09/14/16 |
| l | 1000 UNION PAC CORP | P | 02/27/08 | 09/14/16 |
| m | 2500 PRUDENTIAL FINL INC | P | 02/25/14 | 09/14/16 |
| n | 3000 WELLS FARGO & CO | P | 10/18/06 | 09/16/16 |
| o | 1000 WELLS FARGO & CO | P | 08/24/07 | 09/16/16 |

| (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 124. | | | 124. |
| b 250,000. | | 250,000. | 0. |
| c 87,019. | | 43,655. | 43,364. |
| d 79,520. | | 30,609. | 48,911. |
| e 88,956. | | 36,515. | 52,441. |
| f 69,096. | | 38,756. | 30,340. |
| g 86,796. | | 47,476. | 39,320. |
| h 66,381. | | 131,047. | -64,666. |
| i 16,966. | | 32,892. | -15,926. |
| j 9,261. | | 14,117. | -4,856. |
| k 132,551. | | 54,773. | 77,778. |
| l 92,872. | | 32,016. | 60,856. |
| m 198,513. | | 210,462. | -11,949. |
| n 136,690. | | 110,850. | 25,840. |
| o 45,563. | | 36,479. | 9,084. |

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

| (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 | (l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-") |
|---------------------------|--------------------------------------|-------------------------------------------------|---------------------------------------------------------------------------------------------------------|
| a | | | 124. |
| b | | | 0. |
| c | | | 43,364. |
| d | | | 48,911. |
| e | | | 52,441. |
| f | | | 30,340. |
| g | | | 39,320. |
| h | | | -64,666. |
| i | | | -15,926. |
| j | | | -4,856. |
| k | | | 77,778. |
| l | | | 60,856. |
| m | | | -11,949. |
| n | | | 25,840. |
| o | | | 9,084. |

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

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

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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 | 1000 WELLS FARGO & CO | P | 06/23/11 | 09/16/16 |
| b | 1500 MCKESSON CORP | P | 05/22/15 | 02/02/17 |
| c | 4000 TWENTY FIRST CENTY FOX | P | 02/13/14 | 02/02/17 |
| d | 3500 TWENTY FIRST CENTY FOX | P | 09/17/14 | 02/02/17 |
| e | 5000 TWENTY FIRST CENTY FOX | P | 03/16/15 | 02/02/17 |
| f | 200000 THERMO FISHER SCIENTIFIC INC 1.85% | P | 06/03/13 | 03/22/17 |
| g | 4400 CVS HEALTH CORPORATION | P | 07/30/08 | 04/21/17 |
| h | 600 CVS HEALTH CORPORATION | P | 12/24/09 | 04/21/17 |
| i | 2500 QUALCOMM INC | P | 08/17/11 | 05/05/17 |
| j | 2500 QUALCOMM INC | P | 03/26/14 | 05/05/17 |
| k | 6000 ROCHE HLDG LTD SPONSORED ADR | P | 11/21/12 | 06/05/17 |
| l | 3000 ROCHE HLDG LTD SPONSORED ADR | P | 05/31/13 | 06/05/17 |
| m | 250000 COSTCO WHSL CORP 1.125% | P | 04/24/15 | 06/15/17 |
| n | 5000 VERIZON COMMUNICATIONS | P | 10/18/13 | 06/22/17 |
| o | 2500 VERIZON COMMUNICATIONS | P | 03/12/14 | 06/22/17 |

| (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 45,563. | | 26,826. | 18,737. |
| b 207,400. | | 361,503. | -154,103. |
| c 125,311. | | 129,327. | -4,016. |
| d 109,647. | | 121,878. | -12,231. |
| e 156,639. | | 172,138. | -15,499. |
| f 201,028. | | 200,258. | 770. |
| g 348,547. | | 169,319. | 179,228. |
| h 47,529. | | 19,332. | 28,197. |
| i 137,140. | | 125,972. | 11,168. |
| j 137,140. | | 199,010. | -61,870. |
| k 195,552. | | 141,089. | 54,463. |
| l 97,776. | | 93,960. | 3,816. |
| m 250,000. | | 250,259. | -259. |
| n 227,449. | | 248,298. | -20,849. |
| o 113,724. | | 116,113. | -2,389. |

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

| (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 | (l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-") |
|---------------------------|--------------------------------------|-------------------------------------------------|---------------------------------------------------------------------------------------------------------|
| a | | | 18,737. |
| b | | | -154,103. |
| c | | | -4,016. |
| d | | | -12,231. |
| e | | | -15,499. |
| f | | | 770. |
| g | | | 179,228. |
| h | | | 28,197. |
| i | | | 11,168. |
| j | | | -61,870. |
| k | | | 54,463. |
| l | | | 3,816. |
| m | | | -259. |
| n | | | -20,849. |
| o | | | -2,389. |

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

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

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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 2000 VERIZON COMMUNICATIONS | | P | 08/15/14 | 06/22/17 |
| b 3600 VERIZON COMMUNICATIONS | | P | 09/17/14 | 06/22/17 |
| c CAPITAL GAINS DIVIDENDS | | | | |
| d | | | | |
| e | | | | |
| f | | | | |
| g | | | | |
| h | | | | |
| i | | | | |
| j | | | | |
| k | | | | |
| l | | | | |
| m | | | | |
| n | | | | |
| o | | | | |

| (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 90,979. | | 97,530. | -6,551. |
| b 163,763. | | 177,691. | -13,928. |
| c 3,887. | | | 3,887. |
| d | | | |
| e | | | |
| f | | | |
| g | | | |
| h | | | |
| i | | | |
| j | | | |
| k | | | |
| l | | | |
| m | | | |
| n | | | |
| o | | | |

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

| (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 | (l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-") |
|---------------------------|--------------------------------------|-------------------------------------------------|---------------------------------------------------------------------------------------------------------|
| a | | | -6,551. |
| b | | | -13,928. |
| c | | | 3,887. |
| d | | | |
| e | | | |
| f | | | |
| g | | | |
| h | | | |
| i | | | |
| j | | | |
| k | | | |
| l | | | |
| m | | | |
| n | | | |
| o | | | |

| | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|----------|
| 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 | 299,232. |
| 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 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 |
|---------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------|------------------------------------------------------|-------------------|
| BOYS AND GIRLS CLUB OF HAVERHILL 55 EMERSON STREET HAVERHILL, MA 01830 | NONE | 501(C)(3) | SUMMER CAMP TASKER & AFTER SCHOOL TEEN PROGRAM | 25,000. |
| BOYS AND GIRLS CLUB OF LOWER MERRIMACK VALLEY 18 MAPLE STREET SALISBURY, MA 01952 | NONE | 501(C)(3) | AFTER SCHOOL PROGRAM | 35,000. |
| CATHOLIC CHARITIES NORTH 117 NORTH COMMON STREET LYNN, MA 01902 | NONE | 501(C)(3) | LYNN ESOL PROGRAM | 40,000. |
| CHALLENGE UNLIMITED IRONSTONE FARM 450 LOWELL STREET ANDOVER, MA 01810 | NONE | 501(C)(3) | EQUINE THERAPY | 10,000. |
| CITIZENS FOR ADEQUATE HOUSING 40 WASHINGTON STREET PEABODY, MA 01960 | NONE | 501(C)(3) | PLAYGROUND | 15,000. |
| ENDICOTT COLLEGE 376 HALE STREET BEVERLY, MA 01915 | NONE | 501(C)(3) | KEYS TO DEGREES | 35,000. |
| ESSEX ART CENTER 56 ISLAND STREET LAWRENCE, MA 01840 | NONE | 509(A)(1) | SI SE PEUDE AND COMMUNITY DAY CHARTER SCHOOL | 10,700. |
| FAMILY & CHILDREN'S SERVICE OF GREATER LYNN 111 NORTH COMMON STREET LYNN, MA 01902 | NONE | 501(C)(3) | TEEN SCENE AFTER SCHOOL ENRICHMENT | 8,000. |
| FAMILY SERVICES OF THE MERRIMACK VALLEY 430 NORTH CANAL STREET LAWRENCE, MA 01840 | NONE | 501(C)(3) | YOUTH MENTORING & CHILD ADVOCACY PROGRAMS | 15,000. |
| FIREHOUSE CENTER FOR THE ARTS MARKET SQUARE NEWBURYPORT, MA 01950 | NONE | 501(C)(3) | YOUTH EDUCATION PROGRAM | 25,000. |
| Total from continuation sheets | | | | 1,037,750. |

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 |
|------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------|----------------------------------------------------|---------|
| GREATER LAWRENCE FAMILY HEALTH CENTER 34 HAVERHILL STREET LAWRENCE, MA 01841 | NONE | 501(C)(3) | LAWRENCE FAMILY MEDICINE RESIDENCY | 30,000. |
| HAWC - HEALING ABUSE WORKING FOR CHANGE 27 CONGRESS STREET, SUITE 201 SALEM, MA 01970 | NONE | 501(C)(3) | PARENT CHILD TRAUMA RECOVERY PROGRAM (PCTRP) | 25,000. |
| HOME HEALTH VNA 360 MERRIMACK STREET LAWRENCE, MA 01843 | NONE | 501(C)(3) | MATERNAL & CHILD HEALTH PROGRAM | 15,000. |
| JEANNE GEIGER CRISIS CENTER TWO HARRIS STREET NEWBURYPORT, MA 01950 | NONE | 501(C)(3) | CHILD WITNESS TO VIOLENCE PROGRAM | 35,000. |
| LYNN COMMUNITY HEALTH CENTER 269 UNION STREET LYNN, MA 01901 | NONE | 501(C)(3) | BEHAVIORAL HEALTH EXPANSION PROJECT | 40,000. |
| LAWRENCE FAMILY DEVELOPMENT & EDUCATION FUND, INC 34 WEST STREET LAWRENCE, MA 01841 | NONE | 501(C)(3) | ALTERNATE YOUTH DEVELOPMENT PROGRAMS | 25,000. |
| LAZARUS HOUSE MINISTRIES INC P.O. BOX 408 LAWRENCE, MA 01842 | NONE | 501(C)(3) | OPENING DOORS | 25,000. |
| MERROHAWKE NATURE SCHOOL PO BOX 235, 54R MERRIMAC ST NEWBURYPORT, MA 01950 | NONE | 501(C)(3) | JUMPSTART YOUTH AT SEA | 3,300. |
| MID COAST HUNGER PREVENTION PROGRAM 12 TENNEY WAY BRUNSWICK, ME 04011 | NONE | 501(C)(3) | THE BACKPACK PROGRAM | 3,750. |
| NORTEHRN ESSEX COMMUNITY COLLEGE 100 ELLIOTT STREET HAVERHILL, MA 01830 | NONE | 501(C)(3) | STEM COLLEGE FOR KIDS PROGRAM | 11,500. |
| Total from continuation sheets | | | | |

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 |
|----------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------|-----------------------------------------------------|---------|
| NORTH SHORE COMMUNITY MEDIATION CENTER 100 CUMMINGS CENTER, SUITE 307-J BEVERLY, MA 01915 | NONE | 501(C)(3) | POSITIVE YOUTH DEV. 7 PEER MEDIATION TRAINING | 38,000. |
| NOTRE DAME CRISTO REY HIGH SCHOOL 303 HAVERHILL STREET LAWRENCE, MA 01840 | NONE | 501(C)(3) | COLLEGE COUNSELING | 25,000. |
| OPEN DOOR 28 EMERSON AVENUE GLOUCESTER, MA 01930 | NONE | 501(C)(3) | SUMMER MEALS FOR KIDS AND FOOD PANTRY | 35,000. |
| OUR NEIGHBORS' TABLE P.O. BOX 592, 145 MAIN STREET AMESBURY, MA 01860 | NONE | 501(C)(3) | FOOD PANTRY PROGRAM 2016-2017 | 25,000. |
| PATHWAYS FOR CHILDREN 29 EMERSON AVENUE GLOUCESTER, MA 01930 | NONE | 501(C)(3) | NURTURING PROGRAM | 20,000. |
| PINGREE SCHOOL 537 HIGHLAND STREET SOUTH HAMILTON, MA 01982 | NONE | 501(C)(3) | PREP AT PINGREE | 20,000. |
| PLUMMER HOME FOR BOYS 37 WINTER ISLAND ROAD SALEM, MA 01970 | NONE | 501(C)(3) | CONNECTING FOSTER CHILDREN TO FAMILIES | 30,000. |
| PREGNANCY CARE CENTER OF THE MERRIMACK VALLEY INC 496 MAIN STREET HAVERHILL, MA 01830 | NONE | 501(C)(3) | NEW LOWELL SATELLITE PROGRAM & SERVICES | 20,000. |
| RAW ART WORKS 37 CENTRAL SQUARE LYNN, MA 01901 | NONE | 501(C)(3) | PROGRAM FOR UNDERSERVED CHILDREN | 20,000. |
| SCREENING FOR MENTAL HEALTH, INC. 1 WASHINGTON STREET, SUITE #304 WELLESLEY HILLS, MA 02481 | NONE | 501(C)(3) | SOS SIGNS OF SUICIDE IN ESSEX COUNTY | 15,000. |
| Total from continuation sheets | | | | |

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 |
|-------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------|---------------------------------------|---------|
| STRAIGHT AHEAD MINISTRIES 791 MAIN STREET WORCESTER, MA 01610 | NONE | 501(C)(3) | LAWRENCE YOUTH RE-ENTRY PROGRAM | 20,000. |
| THE HAVEN PROJECT 57 MUNROE STREET LYNN, MA 01901 | NONE | 501(C)(3) | DROP-IN CENTER | 20,000. |
| THE PETTENGILL HOUSE, INC 13 LAFAYETTE ROAD SALISBURY, MA 01952 | NONE | 501(C)(3) | HEALTH & WELL BEING | 50,000. |
| UTEC 15 WARREN STREET, #3 LOWELL, MA 01852 | NONE | 501(C)(3) | INFORMATION TECH EQUIPMENT | 12,000. |
| UP WITH MUSIC 1213 SALEM STREET NORTH ANDOVER, MA 01845 | NONE | 501(C)(3) | LAWRENCE STRING PROGRAM | 4,000. |
| WELLSPRING HOUSE 302 ESSEX AVENUE GLOUCESTER, MA 01930 | NONE | 501(C)(3) | ADULT EDUCATION & TRAINING PROGRAM | 14,000. |
| YOUTH DEVELOPMENT ORGANIZATION 15 UNION STREET, #563 LAWRENCE, MA 01840 | NONE | 501(C)(3) | OUT OF SCHOOL ENRICHMENT | 25,000. |
| YWCA OF GREATER LAWRENCE 38 LAWRENCE STREET LAWRENCE, MA 01840 | NONE | 501(C)(3) | EMERGENCY CHELTER IMPROVEMENTS | 35,000. |
| BEVERLY CHILDREN'S LEARNING CENTER 550 CABOT STREET BEVERLY, MA 01915 | NONE | 509(A)(1) | LANDSCAPING & EQUIP OUTDOOR SPACE | 15,000. |
| COR UNUM 118 SOUTH BROADWAY LAWRENCE, MA 01843 | NONE | 501(C)(3) | MEAL CENTER | 30,000. |
| Total from continuation sheets | | | | |

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 |
|--------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------|--------------------------------------------|---------|
| ESPERANZA ACADEMY 198 GARDEN STREET LAWRENCE, MA 01840 | NONE | 501(C)(3) | FACULTY SALARIES & FACULTY RETENTION | 20,000. |
| GREGG NEIGHBORHOOD HOUSE ASSOCIATION, INC 85 WXCHANGE STREET, SUITE #301 LYNN, MA 01901 | NONE | 501(C)(3) | RENOVATION TO PRESCHOOL KITCHEN | 22,000. |
| GROUNDWORK LAWRENCE 50 ISLAND STREET, SUITE 101 LAWRENCE, MA 01840 | NONE | 501(C)(3) | YOUTH EDUCATION PROGRAM | 15,000. |
| LA VIDA SCHOLARS 40 GREEN STREET LYNN, MA 01902 | NONE | 501(C)(3) | LA VIDA SCHOLARS | 25,000. |
| MELMARK NEW ENGLAND 461 RIVER ROAD ANDOVER, MA 01810 | NONE | 501(C)(3) | ORGANIZATIONAL BEHAVIOR MANAGEMENT | 5,500. |
| ROCKPORT MUSIC 37 MAIN STREET ROCKPORT, MA 01966 | NONE | 501(C)(3) | EDUCATION & OUTREACH PROGRAM | 5,000. |
| THE GOVERNOR'S ACADEMY 1 ELM STREET BYFIELD, MA 01922 | NONE | 501(C)(3) | GOVSPLUS | 15,000. |
| SALEM STATE UNIVERSITY FOUNDATION, INC 352 LAFAYETTE STREET SALEM, MA 01970 | NONE | 501(C)(3) | YAR (YOUTH AT RISK PROGRAM) | 5,000. |
| YWCA OF NEWBURYPORT 13 MARKET STREET NEWBURYPORT, MA 01950 | NONE | 501(C)(3) | CHILDREN'S CENTER & SCHOOL'S OUT SUMMER | 20,000. |
| Total from continuation sheets | | | | |

| FORM 990-PF | | DIVIDENDS AND INTEREST FROM SECURITIES | | | STATEMENT | 1 |
|------------------------------|-----------------|----------------------------------------|-----------------------------|-----------------------------------|-------------------------------|---|
| SOURCE | GROSS AMOUNT | CAPITAL GAINS DIVIDENDS | (A) REVENUE PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | |
| STATE STREET BANK-NOMINEE | 439,221. | 3,887. | 435,334. | 435,334. | | |
| TO PART I, LINE 4 | 439,221. | 3,887. | 435,334. | 435,334. | | |

| FORM 990-PF | | ACCOUNTING FEES | | | STATEMENT | 2 |
|------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|-----------|---|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES | | |
| TAX PREPARATION | 4,150. | 2,780. | | 1,370. | | |
| TO FORM 990-PF, PG 1, LN 16B | 4,150. | 2,780. | | 1,370. | | |

| FORM 990-PF | | OTHER PROFESSIONAL FEES | | | STATEMENT | 3 |
|------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|-----------|---|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES | | |
| INVESTMENT MGMT FEE | 95,215. | 63,794. | | 31,421. | | |
| CUSTODIAL FEES | 5,781. | 5,781. | | 0. | | |
| TO FORM 990-PF, PG 1, LN 16C | 100,996. | 69,575. | | 31,421. | | |

| FORM 990-PF | | TAXES | | | STATEMENT | 4 |
|-----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|-----------|---|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES | | |
| FOREIGN TAXES | 3,924. | 3,924. | | 0. | | |
| TO FORM 990-PF, PG 1, LN 18 | 3,924. | 3,924. | | 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 | |
| FORM PC FILING FEE | 125. | 0. | | 0. | |
| ADR FEES | 277. | 277. | | 0. | |
| TO FORM 990-PF, PG 1, LN 23 | 402. | 277. | | 0. | |

FOOTNOTES

STATEMENT 6

PART VIII

CHRISTOPHER T BARROW AND ROGER G SCOVILLE, TRUSTEES, ARE PRINCIPALS IN THE INVESTMENT FIRM OF SEAWARD MANAGEMENT. THEY EACH PROVIDE INVESTMENT MANAGEMENT AND HAVE BEEN COMPENSATED FOR THEIR INVESTMENT SERVICES IN ACCORDANCE WITH THE COMPANY'S STANDARD RATE SCHEDULE.

FORM 990-PF

CORPORATE STOCK

STATEMENT

7

| DESCRIPTION | BOOK VALUE | FAIR MARKET VALUE |
|-------------------------------------|------------|-------------------|
| 3M CO | 146,060. | 416,380. |
| ABBOTT LABORATORIES | 282,769. | 557,800. |
| ALPHABET INC CL A(GOOGLE INC-CL C) | 376,343. | 728,801. |
| ALPHABET INC CL A(GOOGLE INC-A) | 98,698. | 278,904. |
| AMAZON COM INC | 82,930. | 145,200. |
| AMGEN | 132,560. | 344,460. |
| APPLE INC | 281,768. | 1,008,140. |
| AUTOMATIC DATA PROCESSING | 141,589. | 409,840. |
| BANK OF AMERICA | 293,606. | 424,550. |
| BECTON DICKINSON & CO | 169,742. | 390,220. |
| BHP BILLITON LTD ADR | 220,766. | 106,770. |
| CAPITAL ONE FINANCIAL CORP | 246,660. | 330,480. |
| CHUBB LTD | 267,370. | 349,930. |
| COCA COLA CO | 133,148. | 273,585. |
| COGNIZANT TECHNOLOGY SOLUTIONS CORP | 174,080. | 365,200. |
| CONOCOPHILIPS | 260,089. | 219,800. |
| CVS HEALTH CORP | 0. | 0. |
| DEERE & CO | 148,361. | 247,180. |
| DIAGEO PLC ADR | 208,356. | 359,490. |
| DU PONT EI DE NEMOURS | 146,516. | 341,484. |
| EXXON MOBIL CORP | 625,338. | 791,154. |
| FACEBOOK INC | 293,941. | 452,940. |
| GENERAL ELECTRIC | 496,650. | 405,150. |
| GILEAD SCIENCES INC | 143,554. | 141,560. |
| GOLDMAN SACHS GROUP INC | 327,496. | 443,800. |
| HOME DEPOT INC | 339,991. | 460,200. |
| INTEL CORP | 173,160. | 263,172. |
| INVESCO LTD | 275,944. | 281,520. |
| MCDONALDS CORP | 115,668. | 306,320. |
| MCKESSON CORP | 0. | 0. |
| NOW INC/DE-W/I | 0. | 0. |
| ORACLE CORP | 371,520. | 501,400. |
| PEPSICO INC | 186,145. | 346,470. |
| PFIZER INC | 518,304. | 571,030. |
| PHILLIPS 66-W/I | 129,577. | 326,625. |
| PROCTER & GAMBLE | 125,224. | 191,730. |
| PRUDENTIAL FINANCIAL INC | 0. | 0. |
| QUALCOMM INC | 0. | 0. |
| RAYTHEON CO | 168,401. | 524,810. |
| ROCHE HOLDINGS LTD | 0. | 0. |
| SALESFORCE COM | 204,691. | 433,000. |
| SCHLUMBERGER | 254,557. | 197,520. |
| THE PRICELINE GROUP INC | 199,235. | 327,341. |
| THERMO FISHER SCIENTIFIC INC | 192,957. | 610,645. |
| TJX COS INC | 322,061. | 338,116. |
| TORONTO DOMINION BANK | 239,221. | 302,280. |
| TWENTY-FIRST CENTURY-CL A-WI | 0. | 0. |

| | | |
|-----------------------------------------|-------------|-------------|
| UNION PACIFIC CORP | 53,647. | 217,820. |
| UNITED TECHNOLOGIES CORP | 121,143. | 207,587. |
| VERIZON COMMUNICATIONS INC | 0. | 0. |
| WELLS FARGO & CO | 0. | 0. |
| WEYERHAEUSER CO | 149,449. | 214,400. |
| BOSTON SCIENTIFIC CORP | 330,941. | 332,640. |
| DISNEY (THE WALT) COMPANY | 388,929. | 371,875. |
| UNITED PARCEL SERVICE INC-B | 353,383. | 364,947. |
| WAL-MART STORES INC | 428,190. | 429,106. |
| TOTAL TO FORM 990-PF, PART II, LINE 10B | 11,340,728. | 17,653,372. |

| | | | |
|-------------|-----------------|-----------|---|
| FORM 990-PF | CORPORATE BONDS | STATEMENT | 8 |
|-------------|-----------------|-----------|---|

| DESCRIPTION | BOOK VALUE | FAIR MARKET VALUE |
|-----------------------------------------|------------|-------------------|
| APPLE INC 2.15% | 250,215. | 248,367. |
| CHEVRON CORP 2.427% 6/24/20 | 200,935. | 202,504. |
| COSTCO WHOLESALE CR 1.125%, 12/15/17 | 0. | 0. |
| DEERE & CO 2.60% | 205,072. | 202,552. |
| GOLDMAN SACHS GROUP 2.6%, 4/23/20 | 249,876. | 252,322. |
| HOME DEPOT INC 2.70% | 255,541. | 253,643. |
| JP MORGAN CHASE & CO 3.15% | 0. | 0. |
| MCDONALDS CORP MTN 1.875% | 251,172. | 249,947. |
| THERMO FISHER SCIENTIFIC 1.85% | 0. | 0. |
| UNITED TECH CORP 3.1% | 255,327. | 258,768. |
| JP MORGAN CHASE & CO 2.4% | 254,400. | 249,528. |
| INTEL CORP 2.7% | 201,439. | 202,558. |
| TOTAL TO FORM 990-PF, PART II, LINE 10C | 2,123,977. | 2,120,189. |

| | | | |
|-------------|-------------------|-----------|---|
| FORM 990-PF | OTHER INVESTMENTS | STATEMENT | 9 |
|-------------|-------------------|-----------|---|

| DESCRIPTION | VALUATION METHOD | BOOK VALUE | FAIR MARKET VALUE |
|----------------------------------------|------------------|------------|-------------------|
| VANGUARD INTM TERM INVT GRADE | COST | 412,127. | 415,360. |
| TOTAL TO FORM 990-PF, PART II, LINE 13 | | 412,127. | 415,360. |

FORM 990-PF

SUMMARY OF DIRECT CHARITABLE ACTIVITIES

STATEMENT 10

ACTIVITY ONE

THE EDWARD S & WINIFRED G MOSELEY FOUNDATION WAS CREATED TO PROVIDE FINANCIAL SUPPORT TO CHARITABLE ORGANIZATIONS WHICH ARE ENTITLED TO EXEMPTION UNDER SECTION 501(C)(3) OF THE IRS CODE OF 1986. THE FOUNDATION FURTHER LIMITS ITS SUPPORT TO ORGANIZATIONS WHICH FOSTER THE HEALTH, EDUCATION, SAFETY OR WELFARE OF CHILDREN, WITH PARTICULAR ATTENTION TO (BUT NOT LIMITED TO) ORGANIZATIONS, ORGANIZED AND OPERATING WITHIN THE GREATER BOSTON AREA. THE TRUSTEES FOCUS ON ORGANIZATIONS THAT SUPPORT FAMILIES AS WELL AS CHILDREN.

EXPENSES

TO FORM 990-PF, PART IX-A, LINE 1

0.