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Form 990-PF

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2016

Open to Public Inspection

For calendar year 2016, or tax year beginning 09-01-2016, and ending 08-31-2017

Name of foundation
SUFFOLK CARES CHARITABLE FOUNDATION
INC

A Employer identification number
20-5409073

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

Room/suite

B Telephone number (see instructions)
(617) 445-3500

City or town, state or province, country, and ZIP or foreign postal code
BOSTON, MA 02119

C If exemption application is pending, check here

G Check all that apply

Initial return

Initial return of a former public charity

Final return

Amended return

Address change

Name change

D 1. Foreign organizations, check here
2. Foreign organizations meeting the 85% test, check here and attach computation

H Check type of organization

Section 501(c)(3) exempt private foundation

Section 4947(a)(1) nonexempt charitable trust

Other taxable private foundation

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

I Fair market value of all assets at end of year (from Part II, col (c), line 16)\$ 6,185,624

J Accounting method

Cash

Accrual

Other (specify)

(Part I, column (d) must be on cash basis)

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

Part I

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

(a)

Revenue and expenses per books

(b)

Net investment income

(c)

Adjusted net income

(d)

Disbursements for charitable purposes (cash basis only)

Revenue

1

Contributions, gifts, grants, etc , received (attach schedule)

8,082,110

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

5a

Gross rents

b

Net rental income or (loss)

6a

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

b

Gross sales price for all assets on line 6a

7

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

0

8

Net short-term capital gain

9

Income modifications

10a

Gross sales less returns and allowances

b

Less Cost of goods sold

c

Gross profit or (loss) (attach schedule)

11

Other income (attach schedule)

12

Total. Add lines 1 through 11

8,082,110

0

Operating and Administrative Expenses

13

Compensation of officers, directors, trustees, etc

0

0

0

14

Other employee salaries and wages

15

Pension plans, employee benefits

16a

Legal fees (attach schedule)

b

Accounting fees (attach schedule)

38,335

0

19,168

c

Other professional fees (attach schedule)

17

Interest

18

Taxes (attach schedule) (see instructions)

45,000

0

0

19

Depreciation (attach schedule) and depletion

20

Occupancy

21

Travel, conferences, and meetings

22

Printing and publications

23

Other expenses (attach schedule)

591

0

0

24

Total operating and administrative expenses.
Add lines 13 through 23

83,926

0

19,168

25

Contributions, gifts, grants paid

7,253,627

7,763,315

26

Total expenses and disbursements. Add lines 24 and 25

7,337,553

0

7,782,483

27

Subtract line 26 from line 12

a

Excess of revenue over expenses and disbursements

744,557

b

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

0

c

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

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form 990-PF (2016)

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	527,518	1,139,082	1,139,082
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4 Pledges receivable ▶ _____ 5,250,000 Less allowance for doubtful accounts ▶ _____ 203,695	5,888,066	5,046,305	5,046,305
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U S and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)			
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)			
	14 Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)	60,415	237	237	
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	6,475,999	6,185,624	6,185,624	
Liabilities	17 Accounts payable and accrued expenses	150,494	145,750	
	18 Grants payable	5,954,531	5,374,343	
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ _____)	450,000	0	
	23 Total liabilities (add lines 17 through 22)	6,555,025	5,520,093	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ☒ and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	-5,967,092	-4,380,774	
	25 Temporarily restricted	5,888,066	5,046,305	
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ☐ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg , and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see instructions)	-79,026	665,531	
31 Total liabilities and net assets/fund balances (see instructions) .	6,475,999	6,185,624		

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	-79,026
2 Enter amount from Part I, line 27a	2	744,557
3 Other increases not included in line 2 (itemize) ▶ _____	3	0
4 Add lines 1, 2, and 3	4	665,531
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	665,531

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			

(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			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			
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	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2015	7,838,116	273,855	28 621409
2014	7,590,069	544,355	13 943234
2013	5,564,932	133,935	41 549498
2012	7,393,506	77,489	95 413620
2011			

2 Total of line 1, column (d)	2 179 527761
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 44 881940
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4 1,811,620
5 Multiply line 4 by line 3	5 81,309,020
6 Enter 1% of net investment income (1% of Part I, line 27b)	6 0
7 Add lines 5 and 6	7 81,309,020
8 Enter qualifying distributions from Part XII, line 4	8 7,782,483

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 ☐ 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	1	0
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	0
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	0
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	
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	0
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	0
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid ▶	10	
11	Enter the amount of line 10 to be Credited to 2017 estimated tax ▶ Refunded ▶	11	

Part VII-A Statements Regarding Activities

		Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	Yes
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>	1b	Yes
c	Did the foundation file Form 1120-POL for this year?	1c	No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ \$ <u>25,000</u> (2) On foundation managers ▶ \$ <u>0</u>		
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ <u>0</u>		
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	2	No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>	5	No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ MA _____		
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i> .	8b	Yes
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9	No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	Yes	
14	The books are in care of ► MICHAEL AZARELA Telephone no ► (617) 445-3500			

Located at **►** 65 ALLERTON STREET BOSTON MAZIP+4 **►** 02119

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			
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 instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). If "Yes," enter the name of the foreign country ►	16	Yes	No

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.**

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ 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)? ☐ Yes ☒ 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). ☐ Yes ☒ 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. ► ☐	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016? ☐	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? ☐ Yes ☒ No If "Yes," list the years ► 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions). ☐	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016). ☐	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2016?	4b		No

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

5a During the year did the foundation pay or incur any amount to				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☒ 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)?		5b	Yes	
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?	☐ 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	6b		No
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?	☐ Yes ☒ No	7b		
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 (see instructions).				
(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
See Additional Data Table				
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
NONE				
Total number of other employees paid over \$50,000.				

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

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

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 SUFFOLK CARES CHARITABLE FOUNDATION, INC PROVIDES FINANCIAL SUPPORT AND ELECTS TO SPONSOR SEVERAL CHARITABLE, CIVIC, EDUCATIONAL, HEALTHCARE, ARTS AND CULTURAL ORGANIZATIONS NATIONWIDE THROUGH FINANCIAL GIVING, THE ORGANIZATION STRIVES TO STRENGTHEN THE NUMEROUS NON-PROFITS THAT CREATE THE FABRIC OF OUR COMMUNITIES	7,253,627
2	
3	
4	

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	0
b	Average of monthly cash balances.	1b	1,839,208
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	1,839,208
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	1,839,208
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	27,588
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	1,811,620
6	Minimum investment return. Enter 5% of line 5.	6	90,581

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	90,581
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	0
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	90,581
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	90,581
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	90,581

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	7,782,483
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	7,782,483
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions).	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	7,782,483

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				90,581
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2016				
a From 2011.				
b From 2012. 7,389,632				
c From 2013. 5,558,235				
d From 2014. 7,562,851				
e From 2015. 7,824,423				
f Total of lines 3a through e.	28,335,141			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ 7,782,483				
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.				90,581
e Remaining amount distributed out of corpus	7,691,902			
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	36,027,043			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2015 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017				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 (see instructions).	0			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	36,027,043			
10 Analysis of line 9				
a Excess from 2012. 7,389,632				
b Excess from 2013. 5,558,235				
c Excess from 2014. 7,562,851				
d Excess from 2015. 7,824,423				
e Excess from 2016. 7,691,902				

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

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

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

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

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

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

a "Assets" alternative test—enter

(1) Value of all assets

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

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

c "Support" alternative test—enter

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

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

(3) Largest amount of support from an exempt organization

(4) Gross investment income

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

1 Information Regarding Foundation Managers:

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

JOHN F FISH

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

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

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

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

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

c Any submission deadlines

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

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> See Additional Data Table				
Total			▶ 3a	8,129,315
b <i>Approved for future payment</i>				
Total			▶ 3b	0

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

13 Total. Add line 12, columns (b), (d), and (e). **13** 0
 (See worksheet in line 13 instructions to verify calculations)

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

[illegible]

Part XVII

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

[illegible]

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

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

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

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

Print/Type preparer's name LYNNE JOHNSON	Preparer's Signature	Date	Check if self-employed ► ☐	PTIN P00757336
Firm's name ► RSM US LLP				Firm's EIN ► 42-0714325
Firm's address ► 80 CITY SQUARE BOSTON, MA 021293742				Phone no (617) 912-9000

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
JOHN F FISH 65 ALLERTON STREET BOSTON, MA 02119	PRESIDENT/DIRECTOR 3 00	0	0	0
GEORGE MASTABY 65 ALLERTON STREET BOSTON, MA 02119	TREASURER/DIR (UNTIL 12/31/16) 3 00	0	0	0
ERIN BROOKS 65 ALLERTON STREET BOSTON, MA 02119	DIRECTOR 13 00	0	0	0
CHRISTINA DEGROOTE TREASURER 65 ALLERTON STREET BOSTON, MA 02119	TREASURER/DIR (FROM 12/31/16) 1 00	0	0	0
WENDY VENOIT 65 ALLERTON STREET BOSTON, MA 02119	CLERK (UNTIL 2/6/17) 1 00	0	0	0
JAY TANGNEY 65 ALLERTON STREET BOSTON, MA 02119	CLERK (FROM 2/6/17) 1 00	0	0	0
SARA CONAHAN 65 ALLERTON STREET BOSTON, MA 02119	DIRECTOR (UNTIL 4/7/17) 1 00	0	0	0

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ACCESS EQUESTRIAN 115 FRANKLIN ST VALHALLA, NY 10595	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
ADOPT-A-STUDENT FOUNDATION 82 DEVONSHIRE STREET BOSTON, MA 02109	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
ALS FAMILY CHARITABLE FOUNDATION INC PO BOX 229 BUZZARDS BAY, MA 02532	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	2,000
ALZHEIMER'S ASSOCIATION 8 HORIZONS ROAD SHARON, MA 02067	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	25,000
AMERICA SCORES NEW ENGLAND INC 29 GERMANIA STREET JAMAICA PLAIN, MA 02130	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	5,000
Total ► 3a				8,129,315

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
AMERICAN CANCER SOCIETY INC 30 SPEEN ST FRAMINGHAM, MA 01701	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	25,150
AMERICAN HEART ASSOCIATION 20 SPEEN STREET FRAMINGHAM, MA 01701	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	25,000
ANTI-DEFAMATION LEAGUE 40 COURT STREET BOSTON, MA 02108	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
ARCHDIOCESE OF BOSTON 42 WENDELL AVENUE BROCKTON, MA 02302	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
ARTISTS FOR HUMANITY 100 WEST 2ND STREET BOSTON, MA 02127	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	5,000
Total ▶ 3a				8,129,315

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BAYSTATE HEALTH FOUNDATION 280 CHESTNUT ST 6TH FLOOR SPRINGFIELD, MA 01199	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	3,500
BETHANY HEALTH CARE CENTER INC 97 BETHANY ROAD FRAMINGHAM, MA 01702	NONE	PUBLIC CHARITY	ACTIVITIES CENTER EXPANSION PROJECT	10,000
BIG BROTHERS BIG SISTERS OF ESSEX HUDSON AND UNION COUNTIES NJ INC 500 BROAD STREET FLOOR 2 NEWARK, NJ 07102	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	500
BIG BROTHERS OF MASSACHUSETTS BAY 75 FEDERAL STREET 5TH FLOOR BOSTON, MA 02110	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
BIG SISTER ASSOCIATION OF GREATER BOSTON 161 MASSACHUSETTS AVENUE BOSTON, MA 02115	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	50,000
Total 3a				8,129,315

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BOSTON ARCHITECTURAL COLLEGE 320 NEWBURY ST BOSTON, MA 02115	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	25,000
BOSTON COLLEGE ST THOMAS MORE HALL ROOM 220 CHESTNUT HILL, MA 02467	NONE	PUBLIC CHARITY	SCHOLARSHIP FUND	22,420
BOSTON COLLEGE ST THOMAS MORE HALL ROOM 220 CHESTNUT HILL, MA 02467	NONE	PUBLIC CHARITY	HOCKEY LOCKER ROOM RENOVATION	100,000
BOSTON COLLEGE TRIBUTE DINNER CADIGAN ALUMNI CENTER CHESTNUT HILL, MA 02467	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	50,000
BOSTON COMMUNITY CAPITAL INC 56 WARREN ST SUITE 300 BOSTON, MA 02119	NONE	PUBLIC CHARITY	WORKING CITIES CHALLENGE	25,000
Total ► 3a				8,129,315

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BOSTON MEDICAL CENTER-DONATION 660 HARRISON AVENUE - 3RD FLOOR BOSTON, MA 02118	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	275,000
BOSTON PLAN FOR EXCELLENCE 27-43 WORMWOOD STREET SUITE 110 BOSTON, MA 02110	NONE	PUBLIC CHARITY	DUDLEY STREET NEIGHBORHOOD CHARTER SCHOOL	1,000
BOSTON PRESERVATION ALLIANCE 45 SCHOOL STREET BOSTON, MA 02472	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	5,000
BOSTON SCHOLAR ATHLETE PROGRAM 65 ALLERTON ST BOSTON, MA 02119	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	1,000
BOSTON SYMPHONY ORCHESTRA INC 301 MASSACHUSETTS AVENUE BOSTON, MA 02115	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	50,000
Total ▶ 3a				8,129,315

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BOY SCOUTS OF AMERICA 411 UNQUITY ROAD MILTON, MA 02186	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	15,000
BOYS & GIRLS CLUB OF SAN FRANCISCO 380 FULTON STREET SAN FRANCISCO, CA 94102	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	2,500
BOYS & GIRLS CLUBS OF BOSTON 50 CONGRESS STREET SUITE 730 BOSTON, MA 02109	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	160,000
BOYS & GIRLS CLUBS OF DORCHESTER INC 1135 DORCHESTER AVENUE BOSTON, MA 02125	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	25,000
BOYS AND GIRLS CLUB OF BROCKTON 233 WARREN AVENUE BROCKTON, MA 02777	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
Total ► 3a				8,129,315

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BOYS AND GIRLS CLUB OF LEE COUNTY INC 7275 CONCOURSE DRIVE 200 FORT MEYERS, FL 33908	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	150
BRANDEIS UNIVERSITY 415 SOUTH STREET WALTHAM, MA 02453	NONE	PUBLIC CHARITY	SCHOLARSHIP FUND	5,000
BRIDGE OVER TROUBLED WATERS 222 FORBES ROAD BRAINTREE, MA 02184	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
BRIGHAM & WOMEN'S HOSPITAL 116 HUNTINGTON AVE BOSTON, MA 02116	NONE	PUBLIC CHARITY	BWH PRESIDENT'S FUND	1,000,000
BROOKLINE TEEN CENTER 40 ASPINWALL AVENUE BROOKLINE, MA 02446	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	2,500
Total 				8,129,315
3a				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BROOKLYN GREENWAY INITIATIVE 153 COLUMBIA STREET BROOKLYN, NY 11231	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	500
BROWN UNIVERSITY PO BOX 1941 PROVIDENCE, RI 02912	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	25,000
BUILDING PATHWAYS 2201 WASHINGTON STREET BOSTON, MA 02119	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
CALIFORNIA HOSPITAL MEDICAL CENTER FOUNDATION 1401 S GRAND AVENUE - LEAVEY HALL LOS ANGELES, CA 90015	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	5,000
CAMP HARBOR VIEW FOUNDATION 200 CLARENDON STREET BOSTON, MA 02116	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	100,000
Total 				8,129,315
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CAMP HARBOR VIEW FOUNDATION 200 CLARENDON STREET BOSTON, MA 02116	NONE	PUBLIC CHARITY	ENDOWMENT FUND	250,000
CAMPAIGN FOR CATHOLIC SCHOOLS 143 NEWBURY STREET 3RD FLOOR BOSTON, MA 02116	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	50,000
CAPE COD HEALTHCARE PO BOX 370 HYANNIS, MA 02601	NONE	PUBLIC CHARITY	EMERGENCY CENTER	1,000,000
CARDINAL CUSHING CENTERS INC 405 WASHINGTON STREET HANOVER, MA 02339	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	5,000
CATHOLIC CHARITIES 75 KNEELAND STREET BOSTON, MA 02111	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	60,000
Total ▶ 3a				8,129,315

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CHILDREN'S HOSPITAL BOSTON 300 LONGWOOD AVENUE BOSTON, MA 02115	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	1,031,000
CHILDREN'S MEDICAL RESEARCH FOUNDATION INC 125 HIGH ST BOSTON, MA 02110	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
CHRISTOPHER MARK CANCER FOUNDATION 9 GREENBRIAR ROAD CANTON, MA 02021	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	1,000
CITIZEN SCHOOLS INC 308 CONGRESS STREET 5TH FL BOSTON, MA 02210	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
COAST GUARD ENLISTED MEMORIAL FOUNDATION PO BOX 476 CAPE MAY, NJ 08204	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	2,250
Total ▶ 3a				8,129,315

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
COMMUNITY SERVINGS 18 MARBURY TERRACE JAMAICA PLAIN, MA 02130	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	25,000
CONGREGATION BETH SHALOM OF THE BLUE HILLS 18 SHOOLMAN WAY MILTON, MA 02186	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	1,500
CONGREGATION OF SISTERS OF ST JOSEPH BOSTON 637 CAMBRIDGE STREET BRIGHTON, MA 02135	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	20,000
COREY C GRIFFIN CHARITABLE FOUNDATION 205 NEWBURY STREET STE 410 FRAMINGHAM, MA 01701	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	100,000
COTUIT ATHLETIC ASSOCIATION INC 59 DOVETAIL LANE COTUIT, MA 02635	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	595
Total ▶ 3a				8,129,315

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CSL FOUNDATION INC 30 NORTH AVENUE BURLINGTON, MA 01803	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	2,000
DANA FARBER CANCER INSTITUTE 10 BROOKLINE PLACE WEST 6TH FLOOR BROOKLINE, MA 02445	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	25,000
DUDLEY STREET NEIGHBORHOOD INITIATIVE 504 DUDLEY STREET ROXBURY, MA 02119	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	6,000
EDWARD M KENNEDY INSTITUTE 400 ATLANTIC AVE BOSTON, MA 02110	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	250,000
ELIZABETH STONE HOUSE INC 8 NOTRE DAME STREET ROXBURY, MA 02119	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	2,500
Total 				8,129,315
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
EMERSON COLLEGE 120 BOYLSTON STREET BOSTON, MA 02116	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
EXPANDING EDUCATIONAL OPPORTUNITIES 535 BOYLSTON ST TOP FLOOR BOSTON, MA 02116	NONE	NC	MASSACHUSETTS COMPETITIVE PARTNERSHIP CAMPAIGN	100,000
FIRST SUFFOLK PARTNERSHIP INC 110 RICHMOND STREET DORCHESTER, MA 02124	NONE	NC	ST PATRICK'S DAY BREAKFAST	15,000
FRANCIS KEVILLE MEMORIAL TRUST FUND 475 SCHOOL STREET SUITE 11 MARSHFIELD, MA 02050	NONE	NC	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	1,000
FRANCISCAN HOSPITAL FOR CHILDREN 30 WARREN STREET BRIGHTON, MA 02135	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	15,000
Total ▶ 3a				8,129,315

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
GATEWAYS ACCESS TO JEWISH EDUCATION INC 333 NAHANTON STREET NEWTON, MA 02459	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	5,000
GREATER NEW YORK COUNCILS BOY SCOUTS OF AMERICA 350 5TH AVENUE SUITE 7820 NEW YORK, NY 10118	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	12,850
HABITAT FOR HUMANITY GREATER BOSTON INC 240 COMMERCIAL ST 4TH FL BOSTON, MA 02109	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	5,000
HABITAT FOR HUMANITY OF GREATER LOS ANGELES 8739 ARTESIA BOULEVARD BELLFLOWER, CA 90706	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	5,000
HABITAT FOR HUMANITY OF HILLSBOROUGH COUNTY 3738 E HILLSBOROUGH AVENUE TAMPA, FL 33610	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	150
Total ► 3a				8,129,315

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
HEBREW SENIORLIFE 1200 CENTER STREET BOSTON, MA 02131	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	25,000
HISTORIC BOSTON INCORPORATED 20 EUSTIS STREET BOSTON, MA 02119	NONE	PRIVATE OPERATING FO	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	5,000
HOMESTART INC 105 CHAUNCY STREET SUITE 502 BOSTON, MA 02111	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
HUDSON PORTUGUESE CLUB INC 166 CENTRAL STREET HUDSON, MA 01749	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	6,000
ILLUMINATION FOUNDATION 2691 RICHTER AVENUE IRVINE, CA 92606	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	2,500
Total ▶ 3a				8,129,315

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
IMMACULATE CONCEPTION CHURCH 3 FAYETTE STREET LOWELL, MA 01852	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
CATHOLIC SCHOOLS FOUNDATION INC 260 FRANKLIN STREET SUITE 630 BOSTON, MA 02110	NONE	PUBLIC CHARITY	INNER-CITY SCHOLARSHIP FUND	25,000
IRISH INTERNATIONAL IMMIGRANT CENTER 100 FRANKLIN STREET LL-1 BOSTON, MA 02110	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	5,000
JEWISH FEDERATION OF PALM BEACH COUNTY 4601 COMMUNITY DRIVE WEST PALM BEACH, FL 33417	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	50,000
JEWISH FEDERATION OF SOUTH PALM BEACH COUNTY 9901 DONNA KLEIN BLVD BOCA RATON, FL 33428	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	2,500
Total ▶ 3a				8,129,315

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
JIMMY MEMORIAL 10 BROOKLINE PLACE WEST 6TH FLOOR BROOKLINE, MA 02445	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	2,500
JOHN F KENNEDY LIBRARY FND COLUMBIA POINT BOSTON, MA 02125	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	100,000
JUNIOR ACHIEVEMENT OF NORTHERN CALIFORNIA 3003 OAK ROAD SUITE 109 WALNUT CREEK, CA 94597	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	1,500
JUNIOR ACHIEVEMENT OF NORTHERN NEW ENGLAND 400 FIFTH AVENUE SUITE 300 WALTHAM, MA 02451	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	5,000
LAHEY CLINIC INC 41 MALL ROAD BURLINGTON, MA 01805	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
Total 				8,129,315
3a				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
LEAP IMAGINATION IN LEARNING 2601 MISSION STREET 603 SAN FRANCISCO, CA 94110	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	2,000
MAKE-A-WISH FOUNDATION OF SOUTHERN FLORIDA 4491 SOUTH STATE ROAD 7 STE 201 FORT LAUDERDALE, FL 33314	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	150
MARC LUSTGARTEN PANCREATIC CANCER FOUNDATION 1111 STEWART AVENUE BETHPAGE, NY 11714	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	200
MARINE TOYS FOR TOTS FOUNDATION 18251 QUANTICO GATEWAY DRIVE TRIANGLE, VA 22172	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	150
MASS MENTORING PARTNERSHIP 75 KNEELAND STREET BOSTON, MA 02111	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
Total ► 3a				8,129,315

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
MASSACHUSETTS ASSOCIATIONAL FOR MENTAL HEALTH INC 50 FEDERAL STREET 6TH FLOOR BOSTON, MA 02110	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	5,000
MJW CHARITABLE FOUNDATION INC C/O ELISSA FLYNN-POPPEY MINTZ LEVIN ONE FINANCIAL CENTER BOSTON, MA 02111	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	50,000
MORGAN STANLEY GLOBAL IMPACT FUNDING TRUST INC PO BOX 990212 BOSTON, MA 02199	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
MUSCULAR DYSTROPHY ASSOCIATION 50 FEDERAL STREET BOSTON, MA 02110	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	8,000
MUSEUM OF AFRICAN AMERICAN HISTORY 14 BEACON STREET SUITE 719 BOSTON, MA 02108	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	25,000
Total ► 3a				8,129,315

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
NAMI CAPE COD & THE ISLANDS 5 MARK LANE HYANNIS, MA 02601	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
NANTUCKET COTTAGE HOSPITAL 57 PROSPECT STREET NANTUCKET, MA 02554	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	3,000
NATIONAL ASSOCIATION OF CORPORATE DIRECTORS NE CHAPTER 10 BACK RIVER RD AMESBURY, MA 01913	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
NEIGHBORS TOGETHER 2094 FULTON STREET BROOKLYN, NY 11233	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
NEWTON-WELLESLEY HOSPITAL 2014 WASHINGTON STREET NEWTON, MA 02462	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	5,000
Total ► 3a				8,129,315

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
NORTHEASTERN UNIVERSITY PO BOX 895 BOSTON, MA 02117	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	250,000
NORTHWELL HEALTH FOUNDATION 2000 MARCUS AVENUE NEW HYDE PARK, NY 11042	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	500
NYC HELMETS TO HARDHATS INC 380 LEXINGTON AVENUE 19TH FL NEW YORK, NY 10168	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	2,500
PALM BEACH ZOO & CONSERVATION SOCIETY 1301 SUMMIT BLVD WEST PALM BEACH, FL 33405	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	25,000
PARTNERS IN HEALTH CARE 800 BOYLSTON STREET SUITE 1400 BOSTON, MA 02199	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	25,000
Total ► 3a				8,129,315

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
PHOENIX CHARTER ACADEMY 59 NICHOLS STREET CHELSEA, MA 02150	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	50,000
PINE STREET INN INC 444 HARRISON AVENUE BOSTON, MA 02118	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	5,000
PMC JIMMY FUND 125 HIGH ST BOSTON, MA 02110	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	1,000
PROJECT PLACE INC 1145 WASHINGTON STREET BOSTON, MA 02118	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	15,000
REGIS COLLEGE 235 WELLESLEY STREET WESTON, MA 02493	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	125,000
Total ▶ 3a				8,129,315

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
RON BURTON TRAINING VILLAGE 222 FORBES ROAD BRAINTREE, MA 02184	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	150,000
SAINT JOHN PAUL II CATHOLIC ACADEMY 2200 DORCHESTER AVE DORCHESTER, MA 02124	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
SAINT JOSEPH PREPARATORY HIGH SCHOOL MOUNT SAINT JOSEPH ACADEMY 617 CAMBRIDGE ST BOSTON, MA 02134	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	50,000
SALVATION ARMY OF LEE COUNTY 10291 MCGREGOR BOULEVARD FORT MEYERS, FL 33919	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	150
SAN FRANCISCO SPECIAL EVENTS COMMITTEE 601 VAN NESS AVENUE E240 SAN FRANCISCO, CA 94102	NONE	PUBLIC CHARITY	EMERGENCY PEDIATRIC CARE	5,000
Total ► 3a				8,129,315

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SAVE THE HARBOR SAVE THE BAY 212 NORTHERN AVE SUITE 304 WEST BOSTON, MA 02210	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	3,500
SILICON VALLEY LEADERSHIP GROUP 2001 GATEWAY PLACE SUITE 101E SAN JOSE, CA 95110	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	12,400
SOCIETY OF JESUS OF NEW ENGLAND 85 SCHOOL STREET WATERTOWN, MA 02471	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	25,000
ST JUDE CHILDREN'S RESEARCH HOSPITAL 313 WASHINGTON STREET 310 NEWTON, MA 02458	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
ST MARY'S WOMEN AND CHILDREN'S CENTER 90 CUSHING AVENUE DORCHESTER, MA 02125	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
Total ► 3a				8,129,315

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ST SEBASTIAN'S SCHOOL FUND INC 1191 GREENDALE AVENUE NEEDHAM, MA 02492	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	100,000
SUFFOLK UNIVERSITY 8 ASHBURTON PLACE BOSTON, MA 02108	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	50,000
TEAM IMPACT 3 BATTERYMARCH PARK 5TH FLOOR QUINCY, MA 02169	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
THE ACADEMY AT OCEAN REEF INC 395 SOUTH HARBOR DR KEY LARGO, FL 33036	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	5,000
THE AMERICAN IRELAND FUND 211 CONGRESS STREET 10TH FLOOR BOSTON, MA 02110	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	125,000
Total ▶ 3a				8,129,315

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE B FUND 25 WESTCLIFF ROAD WESTON, MA 02493	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
THE BASE 11 WALNUT PARK ROXBURY, MA 02119	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	25,000
THE CAMMEBY'S SCHOLARSHIP FUND 45 BROADWAY 25TH FL NEW YORK, NY 10006	NONE	PUBLIC CHARITY	SCHOLARSHIP FUND	50,000
THE CRISIS CENTER OF TAMPA BAY INC 14901 CRISIS CENTER PLAZA TAMPA, FL 33613	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	2,500
THE EVAN FOUNDATION 338 HOWARD STREET BROCKTON, MA 02302	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	15,000
Total ► 3a				8,129,315

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE FOUNDATION FOR LEE COUNTY PUBLIC SCHOOLS INC PO BOX 1608 FORT MEYERS, FL 33901	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
THE FUND FOR HOBART AND WILLIAM SMITH 615 SOUTH MAIN STREET GENEVA, NY 14456	NONE	PUBLIC CHARITY	SCHOLARSHIP FUND	100,000
THE GREATER BOSTON FOOD BANK 70 SOUTH BAY AVENUE BOSTON, MA 02118	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
THE LENNY ZAKIM FUND C/O DLA PIPER 33 ARCH STREET 26TH FLOOR BOSTON, MA 02110	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
THE LINKS FOUNDATION INCORPORATED 68 LOWELL ROAD WELLESLEY, MA 02468	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
Total ▶ 3a				8,129,315

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE LOIS MERRILL FOUNDATION 1345 ENCINITAS BOULEVARD 312 ENCINITAS, CA 92024	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	1,000
THE MASSACHUSETTS CONFERENCE FOR WOMEN 9600 GREAT HILLS TRAIL SUITE 150W AUSTIN, TX 78759	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	25,000
THE MCLEAN HOSPITAL CORPORATION 115 MILL ST BELMONT, MA 02478	NONE	PUBLIC CHARITY	NANCY AND RICHARD SIMCHES DIVISION OF CHILD AND ADOLESCENT PSYCHIATRY	50,000
THE NORMAN B LEVENTHAL MAP CENTER INC 700 BOYLSTON STREET BOSTON, MA 02116	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	100,000
THE STEFANIE SPIELMAN FUND FOR BREAST CANCER RESEARCH 1480 WEST LANE AVENUE COLUMBUS, OH 43221	NONE	PUBLIC CHARITY	BREAST CANCER RESEARCH	200
Total ▶ 3a				8,129,315

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE STEPPINGSTONE FOUNDATION INC 155 FEDERAL ST BOSTON, MA 02110	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
TITO JACKSON COMMUNITY FUND INC 185 DEVONSHIRE STREET SUITE 200 BOSTON, MA 02110	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	5,000
TRINITY BOSTON FOUNDATION 206 CLARENDON STREET BOSTON, MA 02116	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	5,000
TRINITY CATHOLIC ACADEMY 37 ERIE AVENUE BROCKTON, MA 02302	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
TUFTS MEDICAL CENTER INC 800 WASHINGTON STREET BOSTON, MA 02111	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	15,250
Total ▶ 3a				8,129,315

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
UJA-FEDERATION OF NEW YORK 130 EAST 59TH STREET NEW YORK, NY 10022	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	3,600
UMASS BOSTON 100 MORRISSEY BOULEVARD BOSTON, MA 02125	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	5,000
UNITED CEREBRAL PALSY OF BROWARD COUNTY INC 2700 WEST 81 STREET HIALEAH, FL 33016	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	7,000
UNITED WAY OF GREATER LOS ANGELES 1150 S OLIVE STREET T500 LOS ANGELES, CA 90015	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	2,500
UNITED WAY OF HUDSON COUNTY 857 BERGEN AVENUE JERSEY CITY, NJ 07306	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	500
Total ► 3a				8,129,315

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
UNITED WAY OF LEE COUNTY INC 7273 CONCOURSE DRIVE FORT MEYERS, FL 33908	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	1,150
UNITED WAY OF MASS BAY AND MERRIMACK VALLEY PO BOX 51381 BOSTON, MA 02205	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	15,000
UNITED WAY OF MIAMI-DADE THE ANSIN BUILDING 3250 SW THIRD AVENUE MIAMI, FL 33129	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	102,500
UNITED WAY OF PALM BEACH COUNTY 477 S ROSEMARY AVE SUITE 230 WEST PALM BEACH, FL 33401	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	1,000
UNIVERSITY OF MASSACHUSETTS AMHERST 300 MASSACHUSETTS AVE AMHERST, MA 01003	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	5,000
Total 3a				8,129,315

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
UNIVERSITY OF NOTRE DAME 1100 GRACE HALL NOTRE DAME, IN 46556	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	600,000
URBAN LEAGUE OF SPRINGFIELD INC ONE FEDERAL ST BLDG 111-3 SPRINGFIELD, MA 01105	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	5,000
US GREEN BUILDING COUNCIL PO BOX 404296 ATLANTA, GA 30384	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	500
WEST END HOUSE BOYS & GIRLS CLUB 105 ALLSTON STREET ALLSTON, MA 02134	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	2,500
WHITTIER STREET HEALTH CENTER 1125 TREMONT STREET ROXBURY, MA 02120	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
Total ► 3a				8,129,315

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
WINCHESTER HOSPITAL FOUNDATION 41 HIGHLAND AVENUE WINCHESTER, MA 01890	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	5,000
WOMEN'S LUNCH PLACE PO BOX 170900 BOSTON, MA 02117	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	10,000
WYC SAILING EDUCATION FOUNDATION 10 GOOSE POINT LANE EAST SANDWICH, MA 02537	NONE	PUBLIC CHARITY	SUPPORT CAPITAL PURCHASE	1,000
YMCA OF GREATER BOSTON INC 316 HUNTINGTON AVE BOSTON, MA 02115	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	2,500
YMCA OF GREATER NEW YORK 5 WEST 63RD ST NEW YORK, NY 10023	NONE	PUBLIC CHARITY	CHARITABLE DONATION FOR THE ORGANIZATION'S GENERAL PURPOSE	15,000
Total 				8,129,315
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CORRECT THE RECORD 455 MASSACHUSETTS AVE NW STE 660 WASHINGTON, DC 20001	NONE	NC	GRANT TO THE POLITICAL ACTION COMMITTEE	250,000
Total 				8,129,315
3a				

TY 2016 Accounting Fees Schedule

Name: SUFFOLK CARES CHARITABLE FOUNDATION
INC

EIN: 20-5409073

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
AUDIT & TAX	38,335	0		19,168

TY 2016 ExplanOfLegisPoliticalActvts

Name: SUFFOLK CARES CHARITABLE FOUNDATION
INC

EIN: 20-5409073

Explanation: SUFFOLK CARES CHARITABLE FOUNDATION, INC. (THE "FOUNDATION") PROVIDED A GRANT OF \$100,000 ON SEPTEMBER 22, 2016 TO A BALLOT MEASURE COMMITTEE, EXPANDING EDUCATIONAL OPPORTUNITIES, WHICH IS AN ORGANIZATION THAT CONDUCTS LOBBYING ACTIVITIES. THE FOUNDATION ATTEMPTED TO RECOVER THE GRANT FROM THE BALLOT MEASURE COMMITTEE WHEN IT BECAME AWARE OF THE DISBURSEMENT OF SUCH GRANT. HOWEVER, THE FOUNDATION DISCOVERED THAT THE BALLOT MEASURE COMMITTEE HAD BEEN DISSOLVED AS OF JANUARY 2017 AND RECOVERY OF THE EXPENDITURE WOULD NOT BE POSSIBLE. SUFFOLK CARES CHARITABLE FOUNDATION, INC. PROVIDED A GRANT OF \$250,000 TO A POLITICAL ACTION COMMITTEE, CORRECT THE RECORD. DISBURSEMENTS WERE MADE ON SEPTEMBER 8, 2016 AND OCTOBER 11, 2016. THE FOUNDATION FULLY RECOVERED AND RECEIVED THE FUNDS FROM THE POLITICAL ACTION COMMITTEE VIA A WIRE TRANSFER ON OCTOBER 31, 2016.

TY 2016 Other Assets Schedule

Name: SUFFOLK CARES CHARITABLE FOUNDATION
INC

EIN: 20-5409073

Other Assets Schedule

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
DUE FROM SCHOLAR ATHLETES, INC (RELATED ORGANIZATION)	60,415	0	0
DUE FROM SUFFOLK CONSTRUCTION COMPANY, INC (RELATED ORGANIZATION)	0	237	237

TY 2016 Other Expenses Schedule

Name: SUFFOLK CARES CHARITABLE FOUNDATION
INC

EIN: 20-5409073

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK FEES	591	0		0

TY 2016 Other Liabilities Schedule

Name: SUFFOLK CARES CHARITABLE FOUNDATION
INC

EIN: 20-5409073

Description	Beginning of Year - Book Value	End of Year - Book Value
DUE TO SUFFOLK CONSTRUCTION COMPANY, INC. (RELATED ORGANIZATION)	450,000	0

TY 2016 Taxes Schedule

Name: SUFFOLK CARES CHARITABLE FOUNDATION
INC

EIN: 20-5409073

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAX EXPENSES	45,000	0		0

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at <u>www.irs.gov/form990</u>	OMB No 1545-0047 2016
	Name of the organization SUFFOLK CARES CHARITABLE FOUNDATION INC	Employer identification number 20-5409073

Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. . . . ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization SUFFOLK CARES CHARITABLE FOUNDATION INC	Employer identification number 20-5409073
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Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	SUFFOLK CONSTRUCTION	\$ 773,870	Person ☒
	65 ALLERTON STREET		Payroll ☐
	BOSTON, MA02119		Noncash ☒ (Complete Part II for noncash contributions)
2	JOHN F FISH	\$ 7,308,240	Person ☒
	65 ALLERTON STREET		Payroll ☐
	BOSTON, MA02119		Noncash ☐ (Complete Part II for noncash contributions)
.		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
.		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
.		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
.		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)

Name of organization SUFFOLK CARES CHARITABLE FOUNDATION INC	Employer identification number 20-5409073
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Part II	Noncash Property
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(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	INTERCOMPANY RECEIVABLE FORGIVEN BY SUFFOLK CONSTRUCTION COMPANY, INC	\$ 450 000	2017-08-31
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

Name of organization SUFFOLK CARES CHARITABLE FOUNDATION INC	Employer identification number 20-5409073
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Part III *Exclusively* religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.) ► \$ _____

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	