

Form 990-PF

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.

2016

**Open to Public
Inspection**

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

Name of foundation SHERRY AND ALAN LEVENTHAL FAMILY FDN C/O BEACON CAPITAL		A Employer identification number 26-3358768			
Number and street (or P O box number if mail is not delivered to street address) 200 STATE STREET 5TH FL		B Telephone number (see instructions) (617) 457-0489			
City or town, state or province, country, and ZIP or foreign postal code BOSTON, MA 02109		C If exemption application is pending, check here ► <input type="checkbox"/>			
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here ► <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation ► <input type="checkbox"/>			
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ► <input type="checkbox"/>			
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ► \$ 2,107,800	J Accounting method <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) <i>(Part I, column (d) must be on cash basis)</i>	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ► <input type="checkbox"/>			
Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue					
1 Contributions, gifts, grants, etc., received (attach schedule)		2,726,981			
2 Check ► <input type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments		64	64		
4 Dividends and interest from securities		11,215	11,215		
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		1,755,320			
b Gross sales price for all assets on line 6a	2,745,791				
7 Capital gain net income (from Part IV, line 2)			1,755,320		
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		4,493,580	1,766,599		
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)		380	0		380
b Accounting fees (attach schedule)		1,825	456		1,369
c Other professional fees (attach schedule)		11,025	1,800		9,225
17 Interest					
18 Taxes (attach schedule) (see instructions)		17,643	0		0
19 Depreciation (attach schedule) and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses (attach schedule)		690	0		690
24 Total operating and administrative expenses.					
Add lines 13 through 23		31,563	2,256		11,664
25 Contributions, gifts, grants paid		6,051,173			6,051,173
26 Total expenses and disbursements. Add lines 24 and 25		6,082,736	2,256		6,062,837
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements		-1,589,156			
b Net investment income (if negative, enter -0-)			1,764,343		
c Adjusted net income (if negative, enter -0-)					

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	5,359,265	2,043,648	2,043,648
	2	Savings and temporary cash investments			
	3	Accounts receivable ►			
		Less allowance for doubtful accounts ►	250		
	4	Pledges receivable ►			
		Less allowance for doubtful accounts ►			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ► 39,225			
		Less allowance for doubtful accounts ► 0	39,225	39,225	39,225
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	36,826	24,927	24,927
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule)			
Liabilities	11	Investments—land, buildings, and equipment basis ►			
		Less accumulated depreciation (attach schedule) ►			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ►			
		Less accumulated depreciation (attach schedule) ►			
	15	Other assets (describe ►)			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	5,435,566	2,107,800	2,107,800
Net Assets or Fund Balances	17	Accounts payable and accrued expenses	3,000	900	
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ►)	3,000	900	
	23	Total liabilities (add lines 17 through 22)			
	Foundations that follow SFAS 117, check here ► <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted	5,432,566	2,106,900	
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ► <input type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see instructions)	5,432,566	2,106,900	
	31	Total liabilities and net assets/fund balances (see instructions)	5,435,566	2,107,800	

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	5,432,566
2	Enter amount from Part I, line 27a	2	-1,589,156
3	Other increases not included in line 2 (itemize) ►	3	0
4	Add lines 1, 2, and 3	4	3,843,410
5	Decreases not included in line 2 (itemize) ►	5	1,736,510
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	2,106,900

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.)
1 a HARBOR INTERNATIONAL FUND INST #2011				2017-04-11	2017-04-13
b DELAWARE US GROWTH FUND INS				1918-07-12	2018-07-12
c THOR INDUS INC				1918-07-13	2018-07-19
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 696,469			381,633		314,836
b 1,033,890			336,180		697,710
c 1,015,432			272,658		742,774
d					
e					
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					314,836
b					697,710
c					742,774
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	1,755,320
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

 Yes No

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

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	5,646,820	3,261,114	1 731562
2014	4,071,060	4,040,431	1 007581
2013	3,924,540	1,831,843	2 142400
2012	2,267,369	1,505,265	1 506292
2011	2,161,307	688,626	3 138579
2 Total of line 1, column (d)			2 9 526414
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 1 905283
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5			4 2,812,298
5 Multiply line 4 by line 3			5 5,358,224
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 17,643
7 Add lines 5 and 6			7 5,375,867
8 Enter qualifying distributions from Part XIII, line 4			8 6,062,837

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)	1	17,643
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		
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	17,643
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	17,643
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	42,570
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	42,570
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	24,927
11	Enter the amount of line 10 to be Credited to 2017 estimated tax ► 24,927	11	0

Part VII-A Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	Yes	No
1b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>	1b	No
1c	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 ► \$ _____ 0 (2) On foundation managers ► \$ _____ 0		
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ► \$ _____ 0		
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <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	No
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	Yes

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 ►THE FOUNDATION	Telephone no ►(617) 457-0489	
Located at ►200 STATE STREET 5TH FLOOR BOSTON MA			ZIP+4 ►02109
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	<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 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 <input type="checkbox"/> No <input checked="" type="checkbox"/>

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 type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?.	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days).	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here.	1b	
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? If "Yes," list the years ► 20____, 20____, 20____, 20____	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions) ►	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If "Yes," did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016).	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2016?	4b	No

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

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

(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)? 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

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

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? Yes No

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).

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
ALAN M LEVENTHAL 200 STATE STREET 5TH FLOOR BOSTON, MA 02109	TRUSTEE 2 00	0	0	0
SHERRY M LEVENTHAL 200 STATE STREET 5TH FLOOR BOSTON, MA 02109	TRUSTEE 2 00	0	0	0

2. Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."

1

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	GRANT MAKING	6,060,398
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		
3	All other program-related investments. See instructions	
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	2,790,973
c	Fair market value of all other assets (see instructions).	1c	64,152
d	Total (add lines 1a, b, and c).	1d	2,855,125
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	2,855,125
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	42,827
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,812,298
6	Minimum investment return. Enter 5% of line 5.	6	140,615

Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign**Part XI** organizations check here ► and do not complete this part)

1	Minimum investment return from Part X, line 6.	1	140,615
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	17,643
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	17,643
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	122,972
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	122,972
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	122,972

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	6,062,837
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	6,062,837
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	17,643
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	6,045,194
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				122,972
2 Undistributed income, if any, as of the end of 2016			0	
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.	2,126,876			
b From 2012.	2,213,109			
c From 2013.	3,883,117			
d From 2014.	3,962,765			
e From 2015.	5,540,520			
f Total of lines 3a through e.	17,726,387			
4 Qualifying distributions for 2016 from Part XII, line 4 ► \$ 6,062,837			0	
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.				122,972
e Remaining amount distributed out of corpus	5,939,865			
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	23,666,252			
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)	2,126,876			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a.	21,539,376			
10 Analysis of line 9				
a Excess from 2012.	2,213,109			
b Excess from 2013.	3,883,117			
c Excess from 2014.	3,962,765			
d Excess from 2015.	5,540,520			
e Excess from 2016.	5,939,865			

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 <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 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.			
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))

ALAN M LEVENTHAL

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

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
1	Program service revenue	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
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						64
4 Dividends and interest from securities.						11,215
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						1,755,320
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	1,766,999
13 Total Add line 12, columns (b), (d), and (e).					13	1,766,599

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

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)				
<i>a Paid during the year</i>				
02 FOR LIFE RAINFOREST FOUNDATION 23 ELIOT ROAD LEXINGTON, MA 02421	NONE	PUBLIC CHARITY	GENERAL	500
ANTI-DEFAMATION LEAGUE 40 COURT ST FL 12 BOSTON, MA 02108	NONE	PUBLIC CHARITY	GENERAL	10,000
BAIS YAAKOV OF BOSTON 198 STRATHMORE ROAD BRIGHTON, MA 02135	NONE	PUBLIC CHARITY	GENERAL	5,000
BETH ISRAEL MEDICAL CENTER 330 BROOKLINE AVENUE BOSTON, MA 02210	NONE	PUBLIC CHARITY	GENERAL	40,000
BOSTON JEWISH FILM FESTIVAL 1001 WATERTOWN STREET NEW NEWTON, MA 02465	NONE	PUBLIC CHARITY	FRIENDSATIONAL CELEBRATION	10,000
Total				6,051,173
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 Paid during the year				
BOSTON MEDICAL CENTER 88 EAST NEWTON STREET BOSTON, MA 02118	NONE	PUBLIC CHARITY	GENERAL	20,000
BOSTON MUNICIPAL RESEARCH BUREAU 333 WASHINGTON STREET NO 854 BOSTON, MA 02108	NONE	PUBLIC CHARITY	HENRY L SHATTUCK PUBLIC SERVICE AWARDS	10,000
BOSTON PUBLIC LIBRARY 700 BOYLSTON STREET BOSTON, MA 02116	NONE	PUBLIC CHARITY	ANNUAL	5,000
BOSTON UNIVERSITY 595 COMMONWEALTH AVENUE BOSTON, MA 02215	NONE	PUBLIC CHARITY	BU DEVELOPMENT FUND	2,088,703
BRIGHAM & WOMEN'S HOSPITAL 1153 CENTRE STREET BOSTON, MA 02130	NONE	PUBLIC CHARITY	GENERAL	100,000
Total ►				6,051,173
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 Paid during the year				
BROOKLINE COMMUNITY MENTAL HEALTH CENTER 41 GARRISON ROAD BROOKLINE, MA 02445	NONE	PUBLIC CHARITY	GENERAL	500
BUCKINGHAM BROWNE & NICHOLS 80 GERRYS LANDING ROAD CAMBRIDGE, MA 02138	NONE	PUBLIC CHARITY	ANNUAL FUND	10,000
CAPE COD FOUNDATION 261 WHITES PATH UNIT 2 YARMOUTH, MA 02664	NONE	PUBLIC CHARITY	GENERAL	10,000
CF AND MS FUND FOUNDATION 26 OVERLOOK LANE GUILFORD, CT 06437	NONE	PUBLIC CHARITY	GENERAL	2,500
COMBINED JEWISH PHILANTHROPIES 126 HIGH STREET BOSTON, MA 02110	NONE	PUBLIC CHARITY	ANNUAL APPEAL	250,500
Total			►	6,051,173
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)				
<i>a Paid during the year</i>				
DAMON RUNYON CANCER RESEARCH FOUNDATION 55 BROADWAY SUITE 302 NEW YORK, NY 10006	NONE	PUBLIC CHARITY	IN MEMORY	225,000
DANA FARBER CANCER INSTITUTE 450 BROOKLINE AVE BOSTON, MA 02215	NONE	PUBLIC CHARITY	GENERAL	500
DR ROSS ZAFONTE RESEARCH FUND 55 FRUIT STREET BOSTON, MA 02114	NONE	PUBLIC CHARITY	GENERAL	1,000
EMERALD NECKLACE CONSERVANCY 125 FENWAY BOSTON, MA 02115	NONE	PUBLIC CHARITY	SUPPORTING THE CONSERVANCY'S PROGRAMMING IN THE EMERALD NECKLACE PARK SYSTEM	2,500
ENVIRONMENTAL LEAGUE OF MASSACHUSETTS 14 BEACON STREET NO 714 BOSTON, MA 02108	NONE	PUBLIC CHARITY	GENERAL	1,000
Total				6,051,173
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 Paid during the year				
EPWORTH CHILDREN'S HOME 2900 MILLWOOD AVE COLUMBIA, SC 29205	NONE	PUBLIC CHARITY	GENERAL	250
FRENCH QUARTER CITIZENS 632 NORTH RAMPART STREET NEW ORLEANS, LA 70112	NONE	PUBLIC CHARITY	GENERAL	3,000
FRIENDS OF THE PUBLIC GARDEN 69 BEACON STREET BOSTON, MA 02108	NONE	PUBLIC CHARITY	GENERAL	25,000
FRIENDS OF YEMIN ORDE 4340 EAST-WEST HIGHWAY SUITE 202 BETHESDA, MD 20814	NONE	PUBLIC CHARITY	GENERAL	2,500
GREATER BOSTON FOOD BANK 70 S BAY AVE BOSTON, MA 02118	NONE	PUBLIC CHARITY	GENERAL	500
Total				6,051,173
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)				
<i>a Paid during the year</i>				
HEADING HOME SCHRAFFT CENTER CHARLESTOWN, MA 02129	NONE	PUBLIC CHARITY	HOUSEWARMING EVENT	25,000
HEBREW SENIOR LIFE 1200 CENTRE STREET BOSTON, MA 02131	NONE	PUBLIC CHARITY	GENERAL	10,000
HENRI & BELINDA TERMEER CENTER - MASS GENERAL 55 FRUIT STREET BOSTON, MA 02114	NONE	PUBLIC CHARITY	GENERAL	1,000
HUNTINGTON THEATRE COMPANY 75 CANTON ST RANDOLPH, MA 02368	NONE	PUBLIC CHARITY	GENERAL	1,000
INNER CITY SCHOLARSHIP FUND 1011 1ST AVE STE 1800 NEW YORK, NY 10022	NONE	PUBLIC CHARITY	GENERAL	25,000
Total				6,051,173
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)				
<i>a Paid during the year</i>				
INNOVATION NETWORK FOR COMMUNITIES 156 GROVER LANE TAMWORTH, NH 03886	NONE	PUBLIC CHARITY	CITY OF BOSTON CLIMATE PREPAREDNESS	200,000
ISIDORE NEWMAN SCHOOL 1903 JEFFERSON AVENUE NEW ORLEANS, LA 70115	NONE	PUBLIC CHARITY	GENERAL	5,000
JEWISH FEDERATION OF GREATER NEW ORLEANS 3747 W ESPLANADE AVENUE METAIRIE, LA 70002	NONE	PUBLIC CHARITY	GENERAL	15,000
JULIANNE ISAACSON FUND AT JEWISH FAMILY SERVICE 3300 W ESPLANADE AVE SUITE 603 METAIRIE, LA 70002	NONE	PUBLIC CHARITY	GENERAL	500
JUSTIN MEE LIFF FUND - PARTY IN THE PARK 125 FENWAY BOSTON, MA 02115	NONE	PUBLIC CHARITY	GENERAL	10,000
Total			►	6,051,173
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 Paid during the year				
LAWYERS CLEARINGHOUSE 16 BEACON ST BOSTON, MA 02108	NONE	PUBLIC CHARITY	GENERAL	15,000
MA INSTITUTE OF TECHNOLOGY 77 MASS AVENUE CAMBRIDGE, MA 02139	NONE	PUBLIC CHARITY	BRAIN AND COGNITIVE SCIENCE FELLOWS, CENTER FOR ADVANCED URBANISM, EUGENE McDERMOTT AWARD IN THE ARTS	1,526,500
METROPOLITAN BOSTON HOUSING PARTNERSHIP 125 LINCOLN ST 5TH FLOOR BOSTON, MA 02111	NONE	PUBLIC CHARITY	GENERAL	5,000
MIND ALZHEIMER'S RESEARCH FUND AT MGH 16TH STREET CHARLESTOWN, MA 02129	NONE	PUBLIC CHARITY	GENERAL	5,000
MSPCA ANGELL 350 SOUTH HUNTINGTON AVEN BOSTON, MA 02130	NONE	PUBLIC CHARITY	GENERAL	1,250
Total				6,051,173
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 Paid during the year				
MUSEUM INSTITUTE FOR TEACHING SCIENCE 1354 HANCOCK ST QUINCY, MA 02169	NONE	PUBLIC CHARITY	GENERAL	2,500
MUSEUM OF AMERICAN FINANCE 48 WALL STREET NEW YORK, NY 10005	NONE	PUBLIC CHARITY	GENERAL	1,500
MUSEUM OF FINE ARTS BOSTON 465 HUNTINGTON AVENUE BOSTON, MA 02115	NONE	PUBLIC CHARITY	GENERAL	3,000
NATIONAL MS SOCIETY 101 1ST AVE WALTHAM, MA 02451	NONE	PUBLIC CHARITY	GENERAL	5,000
NATIONAL WORLD WAR II MUSEUM 945 MAGAZINE STREET NEW ORLEANS, LA 70130	NONE	PUBLIC CHARITY	GENERAL	15,000
Total				6,051,173
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 Paid during the year				
NEIGHBORHOOD HOUSE CHARTER SCHOOL 21 QUEEN STREET DORCHESTER, MA 02122	NONE	PUBLIC CHARITY	GENERAL	55,000
NEW ENGLAND AQUARIUM CENTRAL WHARF BOSTON, MA 02110	NONE	PUBLIC CHARITY	GENERAL	10,000
NEW YORK HISTORICAL SOCIETY CENTRAL PARK W 79TH ST NEW YORK, NY 10024	NONE	PUBLIC CHARITY	GENERAL	25,000
NORMAN B LEVENTHAL MAP CENTER 700 BOYLSTON STREET BOSTON, MA 02116	NONE	PUBLIC CHARITY	GENERAL	277,500
NORTHWESTERN UNIVERSITY 2020 RIDGE AVENUE EVANSTON, IL 60208	NONE	PUBLIC CHARITY	GENERAL	10,000
Total				6,051,173
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 Paid during the year				
PAN MASS CHALLENGE 77 FOURTH AVENUE NEEDHAM, MA 02494	NONE	PUBLIC CHARITY	GENERAL	5,500
PRO BONO PUBLICO FOUNDATION 601 POYDRAS STREET SUITE 1815 NEW ORLEANS, LA 70130	NONE	PUBLIC CHARITY	GENERAL	5,000
SCHOLAR ATHLETES 57 MAGAZINE ST ROXBURY, MA 02119	NONE	PUBLIC CHARITY	GENERAL	50,000
SPIRIT OF ADVENTURE COUNCIL 600 W CUMMINGS PARK WOBURN, MA 01801	NONE	PUBLIC CHARITY	GENERAL	5,000
TEMPLE BETH ELOHIM 10 BETHEL ROAD WELLESLEY, MA 02481	NONE	PUBLIC CHARITY	GENERAL	504,470
Total				6,051,173
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 Paid during the year				
THE BOSTON ANTHENAEUM 10 BEACON STREET BOSTON, MA 02108	NONE	PUBLIC CHARITY	ANNUAL FUND	3,000
THE BOSTON FOUNDATION 75 ARLINGTON ST BOSTON, MA 02116	NONE	PUBLIC CHARITY	GENERAL	5,000
THE FUND FOR PARKS AND RECREATION 1010 MASS AVENUE BOSTON, MA 02118	NONE	PUBLIC CHARITY	GENERAL	55,000
TRUSTEES DARTMOUTH COLLEGE - TUCK SCHOOL OF BUSINESS TUCK SCHOOL OF BUSINESS HANOVER, NH 03775	NONE	PUBLIC CHARITY	GENERAL	50,000
TULANE UNIVERSITY HILLEL 912 BROADWAY NEW ORLEANS, LA 70118	NONE	PUBLIC CHARITY	GENERAL	1,000
Total				6,051,173
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 Paid during the year				
TULANE UNIVERSITY 6823 ST CHARLES AVENUE NEW ORLEANS, LA 70118	NONE	PUBLIC CHARITY	PRESIDENTIAL OPPORTUNITY FUND, TULANE LAW FUND	230,500
UNITED NEGRO COLLEGE FUND 1805 7TH STREET NW WASHINGTON, DC 20001	NONE	PUBLIC CHARITY	GENERAL	25,000
UNITED STATES HOLOCAUST MEMORIAL MUSEUM 100 RAOUL WALLENBERG PLACE SW WASHINGTON, DC 20024	NONE	PUBLIC CHARITY	GENERAL	10,000
UNITED WAY OF MASS 51 SLEEPER STREET BOSTON, MA 02210	NONE	PUBLIC CHARITY	GENERAL	25,000
WGBH ONE GUEST STREET BOSTON, MA 02135	NONE	PUBLIC CHARITY	GENERAL	2,500
Total				6,051,173
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)				
<i>a Paid during the year</i>				
YARMOUTH FIREFIGHTERS AND RELIEF 96 OLD MAIN STREET SOUTH YARMOUTH, MA 02664	NONE	PUBLIC CHARITY	GENERAL	500
Total			►	6,051,173
3a				

TY 2016 Accounting Fees Schedule

Name: SHERRY AND ALAN LEVENTHAL FAMILY FDN
C/O BEACON CAPITAL

EIN: 26-3358768

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
KEVIN P MARTIN & ASSOCIATES	1,825	456		1,369

TY 2016 Legal Fees Schedule

Name: SHERRY AND ALAN LEVENTHAL FAMILY FDN
C/O BEACON CAPITAL
EIN: 26-3358768

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MINTZ LEVIN LEGAL FEES	380	0		380

TY 2016 Other Decreases Schedule

Name: SHERRY AND ALAN LEVENTHAL FAMILY FDN

C/O BEACON CAPITAL

EIN: 26-3358768

Description	Amount
NET DIFFERENCE BETWEEN REALIZED TAX AND GAAP BASIS GAIN, ON STOCK SOLD	1,736,510

TY 2016 Other Expenses Schedule

Name: SHERRY AND ALAN LEVENTHAL FAMILY FDN

C/O BEACON CAPITAL

EIN: 26-3358768

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FILING FEES	550	0		550
OFFICE EXPENSES	140	0		140

TY 2016 Other Notes/Loans Receivable Short Schedule

Name: SHERRY AND ALAN LEVENTHAL FAMILY FDN
C/O BEACON CAPITAL

EIN: 26-3358768

Name of 501(c)(3) Organization	Balance Due
MURIEL & NORMAN B LEVENTHAL FAMILY FOUNDATION INC	39,225

TY 2016 Other Professional Fees Schedule

Name: SHERRY AND ALAN LEVENTHAL FAMILY FDN
C/O BEACON CAPITAL
EIN: 26-3358768

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
RIDGEWAY ADVISORS, LLC PHILANTHROPIC ADVISORS	9,225	0		9,225
INVESTMENT MANAGEMENT FEES	1,800	1,800		0

TY 2016 Substantial Contributors

Schedule

Name: SHERRY AND ALAN LEVENTHAL FAMILY FDN

C/O BEACON CAPITAL

EIN: 26-3358768

Name	Address
ALAN M LEVENTHAL	200 STATE STREET 5TH FLOOR BOSTON, MA 02109

TY 2016 Taxes Schedule

Name: SHERRY AND ALAN LEVENTHAL FAMILY FDN
C/O BEACON CAPITAL
EIN: 26-3358768

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL EXCISE TAXES	17,643	0		0

Schedule B
(Form 990, 990-EZ,
or 990-PF)Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

OMB No 1545-0047

► 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
www.irs.gov/form990

2016**Name of the organization**SHERRY AND ALAN LEVENTHAL FAMILY FDN
C/O BEACON CAPITAL**Employer identification number**

26-3358768

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

Form 990-PF

527 political organization
 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 SHERRY AND ALAN LEVENTHAL FAMILY FDN C/O BEACON CAPITAL		Employer identification number 26-3358768	
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	ALAN M LEVENTHAL 200 STATE STREET BOSTON, MA02109	\$ 2,726,981	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input checked="" type="checkbox"/>
(Complete Part II for noncash contributions)			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/>
(Complete Part II for noncash contributions)			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/>
(Complete Part II for noncash contributions)			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/>
(Complete Part II for noncash contributions)			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/>
(Complete Part II for noncash contributions)			

Name of organization SHERRY AND ALAN LEVENTHAL FAMILY FDN C/O BEACON CAPITAL		Employer identification number 26-3358768	
Part II Noncash Property			
(see instructions) Use duplicate copies of Part II if additional space is needed			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	VARIOUS SECURITIES	\$ 2,726 981	2017-07-15
(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 organizationSHERRY AND ALAN LEVENTHAL FAMILY FDN
C/O BEACON CAPITAL**Employer identification number**

26-3358768

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
	(e) Transfer of gift Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	(e) Transfer of gift Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	(e) Transfer of gift Transferee's name, address, and ZIP 4		Relationship of transferor to transferee