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 12-01-2016 , and ending 11-30-2017

Name of foundation
MCLANEHARPER CHARITABLE FOUNDATION INC

A Employer identification number
04-2944189

Number and street (or P O box number if mail is not delivered to street address)
c/o PA McLane 200 Clarendon St FL56

Room/suite

B Telephone number (see instructions)
(617) 574-6700

City or town, state or province, country, and ZIP or foreign postal code
Boston, MA 02116

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)*▶$ 39,877,458

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)	3,988,340			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	18,035	17,959		
	4	Dividends and interest from securities	277,692	277,692		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	1,061,521			
	b	Gross sales price for all assets on line 6a 8,015,620				
	7	Capital gain net income (from Part IV, line 2)		4,397,032		
	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)	28,439	-3,576		
	12	**Total.** Add lines 1 through 11	5,374,027	4,689,107		
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)	1,905	1,905		0
	c	Other professional fees (attach schedule)	28,423	28,423		0
	17	Interest	294	294		0
	18	Taxes (attach schedule) (see instructions)	22,080	2,083		0
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	82,872	58,648		0
	24	**Total operating and administrative expenses.** Add lines 13 through 23	135,574	91,353		0
	25	Contributions, gifts, grants paid	1,740,365			1,740,365
	26	**Total expenses and disbursements.** Add lines 24 and 25	1,875,939	91,353		1,740,365
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	3,498,088			
	b	**Net investment income** (if negative, enter -0-)		4,597,754		
	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 (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	484,667	3,370,152	3,370,152
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶			
		Less allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach 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)	10,642,244	9,438,927	21,551,506
	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)	6,863,175	9,949,428	14,955,800
	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)	17,990,086	22,758,507	39,877,458
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)	261,500	1,531,833	
	23	**Total liabilities**(add lines 17 through 22)	261,500	1,531,833	
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			
	25	Temporarily restricted			
	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	0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	17,728,586	21,226,674	
	30	**Total net assets or fund balances** (see instructions)	17,728,586	21,226,674	
	31	**Total liabilities and net assets/fund balances** (see instructions)	17,990,086	22,758,507	

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	17,728,586
2	Enter amount from Part I, line 27a	2	3,498,088
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	21,226,674
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	21,226,674

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 See Additional Data Table			
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a See Additional Data Table			
b			
c			
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 See Additional Data Table			
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	4,397,032
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	1,702,186	34,031,510	0 050018
2014	1,527,414	34,376,078	0 044432
2013	1,207,435	33,403,489	0 036147
2012	1,838,424	29,484,377	0 062352
2011	1,643,500	30,751,875	0 053444

2 Total of line 1, column (d)	2	0 246393
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	0 049279
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	34,368,882
5 Multiply line 4 by line 3	5	1,693,664
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	45,978
7 Add lines 5 and 6	7	1,739,642
8 Enter qualifying distributions from Part XII, line 4	8	1,740,365

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	45,978
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	45,978
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	45,978
6	Credits/Payments				
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	26,244		
b	Exempt foreign organizations—tax withheld at source	6b			
c	Tax paid with application for extension of time to file (Form 8868)	6c	35,000		
d	Backup withholding erroneously withheld	6d			
7	Total credits and payments Add lines 6a through 6d.			7	61,244
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached			8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	15,266
11	Enter the amount of line 10 to be **Credited to 2017 estimated tax** ▶ 15,266 **Refunded** ▶			11	0

Part VII-A **Statements Regarding Activities**

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?.	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities*			
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 ▶ $ 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? *If "Yes," attach a detailed description of the activities*	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? *If "Yes," attach a conformed copy of the changes*	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? *If "Yes," attach the statement required by General Instruction T*	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? *If "Yes," complete Part II, col (c), and Part XV*	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? *If "No," attach explanation* .	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)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		No

Part VII-A Statements Regarding Activities (continued)

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		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?	13	Yes	

Website address ▶N/A

14 The books are in care of ▶David H Hopfenberg Telephone no ▶(401) 667-0504

Located at ▶31 Home Depot Drive 294 Plymouth MA ZIP+4 ▶02360

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

			Yes	No
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?	16		No
	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 ▶			

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

			Yes	No
	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)			
	(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)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
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**		
	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*	**6b**		No
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?	**7b**		

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

1 List all officers, directors, trustees, foundation managers and their compensation (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	**(e)** Expense account, other allowances
P Andrews McLane 77 Dean Road Weston, MA 02493	President 0 00	0	0	0
Linda McLane 77 Dean Road Weston, MA 02493	Treasurer 0 00	0	0	0
David H Hopfenberg 122 North Road Saunderstown, RI 02874	Clerk 0 00	0	0	0

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

(a) Name and address of each employee paid more than $50,000	Title, and average hours per week **(b)** devoted to position	**(c)** Compensation	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
NONE				

Total number of other employees paid over $50,000 ▶ 0

Part 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	
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	23,564,484
b	Average of monthly cash balances.			1b	843,729
c	Fair market value of all other assets (see instructions).			1c	10,484,053
d	**Total** (add lines 1a, b, and c).			1d	34,892,266
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	34,892,266
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).			4	523,384
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4			5	34,368,882
6	**Minimum investment return.** Enter 5% of line 5.			6	1,718,444

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

1	Minimum investment return from Part X, line 6.			1	1,718,444
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	45,978		
b	Income tax for 2016 (This does not include the tax from Part VI).	2b			
c	Add lines 2a and 2b.			2c	45,978
3	Distributable amount before adjustments Subtract line 2c from line 1.			3	1,672,466
4	Recoveries of amounts treated as qualifying distributions.			4	0
5	Add lines 3 and 4.			5	1,672,466
6	Deduction from distributable amount (see instructions).			6	0
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.			7	1,672,466

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	1,740,365
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	1,740,365
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	45,978
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4.	6	1,694,387

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI, line 7				1,672,466
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only.			1,678,785	
b Total for prior years 20___, 20___, 20___		0		
3 Excess distributions carryover, if any, to 2016				
a From 2011.				
b From 2012.				
c From 2013.				
d From 2014.				
e From 2015.				
f **Total** of lines 3a through e.	0			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ $ 1,740,365				
a Applied to 2015, but not more than line 2a			1,678,785	
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.				61,580
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2016 *(If an amount appears in column (d), the same amount must be shown in column (a))*	0			0
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		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				1,610,886
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	0			
10 Analysis of line 9				
a Excess from 2012.				
b Excess from 2013.				
c Excess from 2014.				
d Excess from 2015.				
e Excess from 2016.				

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)

	Tax year (a) 2016	Prior 3 years (b) 2015	(c) 2014	(d) 2013	(e) Total
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))

P Andrews McLane

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 *Paid during the year* See Additional Data Table				
Total . . . . ▶ **3a**				1,735,337
b *Approved for future payment*				
Total . . . . ▶ **3b**				0

Part XVI-A Analysis of Income-Producing Activities

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			14	18,035	
4 Dividends and interest from securities. . . .			14	277,692	
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.			18	28,439	
8 Gain or (loss) from sales of assets other than inventory			18	1,061,521	
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		1,385,687	0

13 Total. Add line 12, columns (b), (d), and (e). **13** 1,385,687

(See worksheet in line 13 instructions to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)

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

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

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

(a) Line No	**(b)** Amount involved	**(c)** Name of noncharitable exempt organization	**(d)** Description of transfers, transactions, and sharing arrangements

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

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge

******	2018-10-11	******
Signature of officer or trustee	Date	Title

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶ ☐	PTIN
David H Hopfenberg		2018-10-13		P00287396
Firm's name ▶ Venture Tax Services Inc				Firm's EIN ▶20-8031866
Firm's address ▶ 31 Home Depot Drive PMB 294 Plymouth, MA 02360				Phone no (617) 553-1497

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
HOTCHKIS & WILEY HIGH		2016-08-26	2017-03-01
PRUDENTIAL JENNISON		2016-12-15	2017-10-05
PRUDENTIAL JENNISON		2016-12-15	2017-10-05
PRUDENTIAL JENNISON		2016-12-15	2017-10-05
ENLINK MIDSTREAM LLC		2016-07-19	2017-03-29
SEMGROUP CORP CL A		2016-06-17	2017-03-29
TARGA RESOURCES		2016-07-19	2017-03-29
WILLIAMS COS INC (DEL)		2016-07-19	2017-03-29
WILLIAMS COS INC (DEL)		2016-07-19	2017-03-29
WILLIAMS COS INC (DEL)		2016-08-10	2017-03-29

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
1,500,000		1,446,515	53,485
772		667	105
5,893		5,097	796
30,309		26,216	4,093
3,883		3,093	790
25,248		20,799	4,449
48,736		32,848	15,888
5,835		4,962	873
38,154		32,253	5,901
24,947		21,576	3,371

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			53,485
			105
			796
			4,093
			790
			4,449
			15,888
			873
			5,901
			3,371

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
Antero Midstream Partners LP		2016-06-01	2017-03-29
Buckeye Partners LP		2016-06-01	2017-03-29
Buckeye Partners LP		2016-07-19	2017-03-29
Dominion Midstream Partners LP		2016-10-31	2017-03-29
Dominion Midstream Partners LP		2017-03-08	2017-03-29
Energy Transfer Equity LP		2016-07-19	2017-03-29
Enlink Midstream Partners LP		2016-07-20	2017-03-29
Enterprise Products Partner LP MLP		2016-06-01	2017-03-29
EQT GP Holdings LP		2016-06-01	2017-03-29
EQT GP Holdings LP		2016-07-19	2017-03-29

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
6,517		5,026	1,491
10,172		10,600	-428
1,695		1,801	-106
28,424		21,409	7,015
9,475		9,260	215
77,205		60,810	16,395
19,061		17,794	1,267
8,179		7,951	228
4,037		3,883	154
2,018		1,939	79

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			1,491
			-428
			-106
			7,015
			215
			16,395
			1,267
			228
			154
			79

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
EQT Midstream Partners LP		2016-06-01	2017-03-29
EQT Midstream Partners LP		2016-07-19	2017-03-29
Magellan Midstream Partners LP		2016-06-01	2017-03-29
Phillips 66 Partners LP		2016-06-01	2017-03-29
Phillips 66 Partners LP		2016-07-19	2017-03-29
Plains All American Pipeline LP		2016-06-01	2017-03-29
Shell Midstream Partners LP		2016-06-01	2017-03-29
Sunoco Logistics Partners LP		2016-06-01	2017-03-29
Valero Energy Partners LP		2016-06-01	2017-03-29
Western Gas Equity Partners LP		2016-07-19	2017-03-29

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
9,561		9,620	-59
1,912		1,918	-6
21,166		19,757	1,409
15,094		16,390	-1,296
2,516		2,696	-180
17,512		11,057	6,455
29,644		31,110	-1,466
13,328		14,693	-1,365
9,709		9,414	295
11,199		9,485	1,714

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			-59
			-6
			1,409
			-1,296
			-180
			6,455
			-1,466
			-1,365
			295
			1,714

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
Western Gas Partners LP		2016-06-01	2017-03-29
Western Gas Partners LP		2016-07-19	2017-03-29
PTP Schedule K-1s			2017-11-30
Lone Cascade LP - Schedule K-1			2015-11-30
TA Investors III LP - Schedule K-1			2015-11-30
LOOMIS SAYLES SR		2015-08-27	2017-05-16
PRUDENTIAL JENNISON		2016-08-25	2017-10-05
ENLINK MIDSTREAM LLC		2016-03-08	2017-03-29
PLAINS GP HOLDINGS LP		2016-03-08	2017-03-29
SEMGROUP CORP CL A		2016-03-08	2017-03-29

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
4,527		3,957	570
4,527		3,858	669
21			21
		203,649	-203,649
52			52
250,000		251,750	-1,750
694,254		600,000	94,254
72,190		34,670	37,520
55,291		31,785	23,506
31,342		19,387	11,955

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			570
			669
			21
			-203,649
			52
			-1,750
			94,254
			37,520
			23,506
			11,955

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
TARGA RESOURCES		2016-03-08	2017-03-29
WILLIAMS COS INC (DEL)		2016-03-08	2017-03-29
Antero Midstream Partners LP		2016-03-08	2017-03-29
Buckeye Partners LP		2016-03-08	2017-03-29
Energy Transfer Equity LP		2016-03-08	2017-03-29
Enlink Midstream Partners LP		2016-03-08	2017-03-29
Enterprise Products Partner LP MLP		2016-03-08	2017-03-29
EQT GP Holdings LP		2016-03-08	2017-03-29
EQT Midstream Partners LP		2016-03-08	2017-03-29
Genesis Energy LP		2016-03-08	2017-03-29

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
78,273		33,443	44,830
25,529		16,064	9,465
30,957		22,204	8,753
25,430		25,597	-167
15,441		5,558	9,883
1,815		1,073	742
49,072		40,493	8,579
14,801		13,141	1,660
9,561		9,412	149
52,931		44,710	8,221

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			44,830
			9,465
			8,753
			-167
			9,883
			742
			8,579
			1,660
			149
			8,221

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
Magellan Midstream Partners LP		2016-03-08	2017-03-29
MPLX LP		2016-03-08	2017-03-29
Phillips 66 Partners LP		2016-03-08	2017-03-29
Plains All American Pipeline LP		2016-03-08	2017-03-29
Shell Midstream Partners LP		2016-03-08	2017-03-29
Sunoco Logistics Partners LP		2016-03-08	2017-03-29
Valero Energy Partners LP		2016-03-08	2017-03-29
Western Gas Equity Partners LP		2016-03-08	2017-03-29
Western Gas Partners LP		2016-03-08	2017-03-29
AFFILIATED MANAGERS		1994-03-31	2017-03-01

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
23,090		20,983	2,107
21,573		15,673	5,900
11,321		13,413	-2,092
29,451		19,208	10,243
29,644		33,013	-3,369
26,049		28,221	-2,172
7,282		7,343	-61
44,797		32,420	12,377
25,652		19,829	5,823
893,407		17,407	876,000

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			2,107
			5,900
			-2,092
			10,243
			-3,369
			-2,172
			-61
			12,377
			5,823
			876,000

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
TEMPUR SEALY INTL INC		2002-11-01	2017-11-01
TEMPUR SEALY INTL INC		2002-11-01	2017-11-01
TEMPUR SEALY INTL INC		2002-11-01	2017-11-01
TEMPUR SEALY INTL INC		2002-11-01	2017-11-01
PTP Schedule K-1s			2017-11-30
Lone Cascade LP - Schedule K-1			2017-11-30
TA Investors III LP - Schedule K-1			2017-11-30
Viking Long III			2017-08-01
Capital Gains Dividends	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
62,718		143	62,575
982,871		2,209	980,662
1,032,417		2,352	1,030,065
1,042,905		2,352	1,040,553
442			442
5,546			5,546
		1,739	-1,739
352,024		180,893	171,131
26,216			26,216

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			62,575
			980,662
			1,030,065
			1,040,553
			442
			5,546
			-1,739
			171,131
			26,216

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
Animal Rescue League of Boston 10 Chandler Street Boston, MA 02116	None	Public Charity	Unrestricted Donation	10,000
Appalachian Mountain Club 5 Joy Street Boston, MA 02108	None	Public Charity	Unrestricted Donation	225,000
Charles River Watershed Assn 190 Park Road Weston, MA 02493	None	Public Charity	Unrestricted Donation	10,000
Currier Gallery 150 Ash Street Manchester, NH 03104	None	Public Charity	Unrestricted Donation	1,500
Fenn School 516 Monument Street Concord, MA 01742	None	Public Charity	Unrestricted Donation	4,000
Total . . . . ▶ **3a**				1,735,337

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
Fessenden School 250 Waltham Street Newton, MA 02465	None	Public Charity	Unrestricted Donation	102,500
Harvard University 1350 Massachusetts Avenue Cambridge, MA 02138	None	Public Charity	Unrestricted Donation	2,500
Landmark School 429 Hale Street Beverly, MA 01915	None	Public Charity	Unrestricted Donation	-4,500
Middlesex School 1400 Lowell Road Concord, MA 01742	None	Public Charity	Unrestricted Donation	2,500
Mill Reef Fund c/o JPM Chase Dept 781682 PO Box 78000 Detroit, MI 48278	None	Public Charity	Unrestricted Donation	7,000
Total . . . . ▶ **3a**				1,735,337

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
Montana Land Reliance 324 Fuller Ave Helena, MT 59624	None	Public Charity	Unrestricted Donation	10,000
MSPCA 350 South Huntington Avenue Jamaica Plain, MA 02130	None	Public Charity	Unrestricted Donation	7,500
Museum of Fine Arts Boston 465 Huntington Avenue Boston, MA 02115	None	Public Charity	Unrestricted Donation	175,000
National Rowing Foundation 67 Mystic Road North Stonington, CT 06359	None	Public Charity	Unrestricted Donation	15,000
NH Historical Society 30 Park Street Concord, MA 03301	None	Public Charity	Unrestricted Donation	5,000
Total . . . . ▶ **3a**				1,735,337

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
Phillips Exeter Academy 20 Main Street Exeter, NH 03933	None	Public Charity	Unrestricted Donation	25,000
Right To Play 49 West 27th Street Suite 930 New York, NY 10001	None	Public Charity	Unrestricted Donation	25,000
Second Congregational Church 16 Court Square Greenfield, MA 01301	None	Public Charity	Unrestricted Donation	200
St Pauls School 325 Pleasant Street Concord, NH 03301	None	Public Charity	Unrestricted Donation	87,500
Steppingstone Foundation 155 Federal Street 800 Boston, MA 02110	None	Public Charity	Unrestricted Donation	60,000
Total . . . . ▶ **3a**				1,735,337

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
Teach For America 60 Canal Street Boston, MA 02114	None	Public Charity	Unrestricted Donation	5,000
Thompson Island Outward Bound PO Box 127 Boston, MA 02127	None	Public Charity	Unrestricted Donation	1,500
University of Michigan 500 S State Street Ann Arbor, MI 48109	None	Public Charity	Unrestricted Donation	5,000
Vanderbilt University 2201 West End Avenue Nashville, TN 37235	None	Public Charity	Unrestricted Donation	2,500
YMCA Camp Belknap 11 Chase Point Road Mirror Lake, NH 03853	None	Public Charity	Unrestricted Donation	5,000
Total . . . . ▶ **3a**				1,735,337

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
Bull Sugar 2336 SE Ocean Blvd 142 Stuart, FL 34996	None	Public Charity	Unrestricted Donation	12,500
Dartmouth Hitchcock Clinic One Medical Center Drive Lebanon, NH 03756	None	Public Charity	Unrestricted Donation	12,500
Clan Maclean Association PO Box 61066 Raleigh, NC 276611066	None	Public Charity	Unrestricted Donation	32,804
Cure Alzheimers Fund 34 Washington Street Suite 200 Wellesley Hills, MA 02481	None	Public Charity	Unrestricted Donation	5,000
Doctors Without Borders 40 Rector Street 16th Floor New York, NY 10006	None	Public Charity	Unrestricted Donation	2,000
Total . . . . ▶ **3a**				1,735,337

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
Friends Of Harvard Rowing 65 N HARVARD STREET Boston, MA 02163	None	Public Charity	Unrestricted Donation	1,000
Gonzaga University 502 E Boone Avenue Spokane, WA 99202	None	Public Charity	Unrestricted Donation	2,500
Dartmouth College - Tuck School 6068 Blunt Alumni Center Ste 103 Hanover, NH 03755	None	Public Charity	Unrestricted Donation	2,500
Riverside Montessori 202 Riverside Drive New York, NY 10025	None	Public Charity	Unrestricted Donation	5,000
Row New York 252 West 37th Street 4th Floor New York, NY 10018	None	Public Charity	Unrestricted Donation	1,000
Total . . . . ▶ **3a**				1,735,337

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
Milford Regional Medical Center 14 Prospect Street Milford, MA 01757	None	Public Charity	Unrestricted Donation	250
The Nature Conservancy NH 22 Bridge Street Fl 4th Concord, NH 03301	None	Public Charity	Unrestricted Donation	100,000
The Pine School 12350 SE Federal Highway Hobe Sound, FL 33455	None	Public Charity	Unrestricted Donation	10,000
US Ski And Snowboard Foundation 1 Victory Lane Box 100 Park City, UT 84060	None	Public Charity	Unrestricted Donation	756,583
Wounded Warrior Project 4899 Belfort Road Suite 300 Jacksonville, FL 32256	None	Public Charity	Unrestricted Donation	2,000
Total . . . . ▶ 3a				1,735,337

TY 2016 Accounting Fees Schedule

Name: MCLANEHARPER CHARITABLE FOUNDATION INC

EIN: 04-2944189

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Venture Tax Services, Inc	1,905	1,905		0

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TY 2016 Applied to Prior Year Election

Name: MCLANEHARPER CHARITABLE FOUNDATION INC

EIN: 04-2944189

Election: Elections can be made under Treasury Regulations section 53.4942(a)-3(d)(2)--The foundation managers declare that the foundation is making this election under the above subparagraph, and a distribution is made out of the undistributed income of taxable year 2012.

TY 2016 Investments Corporate Stock Schedule

Name: MCLANEHARPER CHARITABLE FOUNDATION INC

EIN: 04-2944189

Name of Stock	End of Year Book Value	End of Year Fair Market Value
UBS (Account PW 20292)	5,134,605	5,411,648
UBS (Account PW A8901)	0	0
UBS (Account PW B0674)	4,304,322	16,139,858

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491289000008

TY 2016 Investments - Other Schedule

Name: MCLANEHARPER CHARITABLE FOUNDATION INC

EIN: 04-2944189

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Lone Cascade LP	AT COST	3,092,279	4,405,405
Nyes Ledge Capital Offshore Ltd	AT COST	382,177	661,605
TA Investors III LP	AT COST	155,865	174,800
Viking Long III	AT COST	2,819,107	5,927,862
Adage Capital Partners, LP	AT COST	3,500,000	3,786,128

TY 2016 Other Expenses Schedule

Name: MCLANEHARPER CHARITABLE FOUNDATION INC

EIN: 04-2944189

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Lone Cascade LP - Schedule K-1 - Portfolio Deductions	53,273	53,273		0
TA Investors III LP - Schedule K-1 - Portfolio Deductions	5,375	5,375		0
Other Deductions	24,224	0		0

TY 2016 Other Income Schedule

Name: MCLANEHARPER CHARITABLE FOUNDATION INC

EIN: 04-2944189

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Gain of Liquidating	32,015	0	32,015
LONE CASCADE LP - SCHEDULE K-1	495	495	495
TA Investors III LP - Schedule K-1	-4,263	-4,263	-4,263
Antero Midstream Partners LP - Ordinary Income	-14	-14	-14
Buckeye Partners LP - Ordinary Income	-425	-425	-425
Dominion Midstream Partners LP - Ordinary Income	-104	-104	-104
Energy Transfer Equity LP - Ordinary Income	-1,082	-1,082	-1,082
Enlink Midstream Partners LP - Ordinary Income	-790	-790	-790
Enterprise Products Partner LP MLP - Ordinary Income	-936	-936	-936
EQT GP Holdings LP - Ordinary Income	-212	-212	-212
EQT Midstream Partners LP - Ordinary Income	-113	-113	-113
Genesis Energy LP - Ordinary Income	-2,283	-2,283	-2,283
Magellan Midstream Partners LP - Ordinary Income	-448	-448	-448
MPLX LP - Ordinary Income	-240	-240	-240
Phillips 66 Partners LP - Ordinary Income	-216	-216	-216
Plains All American Pipeline LP - Ordinary Income	-898	-898	-898
Shell Midstream Partners LP - Ordinary Income	-555	-555	-555
Sunoco Logistics Partners LP - Ordinary Income	-420	-420	-420
Valero Energy Partners LP - Ordinary Income	-120	-120	-120
Western Gas Equity Partners LP - Ordinary Income	-884	-884	-884

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Western Gas Partners LP - Ordinary Income	-553	-553	-553
Energy Transfer Equity LP - Other net rental income	-2	-2	-2
Buckeye Partners LP - Net gain (loss) under section 1231	-68	-68	-68
Energy Transfer Equity LP - Net gain (loss) under section 1231	7	7	7
Enlink Midstream Partners LP - Net gain (loss) under section 1231	-12	-12	-12
Enterprise Products Partner LP MLP - Net gain (loss) under section 1231	-28	-28	-28
EQT GP Holdings LP - Net gain (loss) under section 1231	-1	-1	-1
EQT Midstream Partners LP - Net gain (loss) under section 1231	-2	-2	-2
Genesis Energy LP - Net gain (loss) under section 1231	-5	-5	-5
MPLX LP - Net gain (loss) under section 1231	6	6	6
Plains All American Pipeline LP - Net gain (loss) under section 1231	63	63	63
Western Gas Equity Partners LP - Net gain (loss) under section 1231	-412	-412	-412
Western Gas Partners LP - Net gain (loss) under section 1231	403	403	403
Buckeye Partners LP - Other Portfolio Income	29	29	29
Genesis Energy LP - Other Portfolio Income	3	3	3
Western Gas Equity Partners LP - Other Portfolio Income	912	912	912
Western Gas Partners LP - Other Portfolio Income	1,741	1,741	1,741
Antero Midstream Partners LP - Ordinary Income	-83	-83	-83
Buckeye Partners LP - Ordinary Income	-1,437	-1,437	-1,437
Dominion Midstream Partners LP - Ordinary Income	-550	-550	-550

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Energy Transfer Equity LP - Ordinary Income	-4,370	-4,370	-4,370
Enlink Midstream Partners LP - Ordinary Income	-3,863	-3,863	-3,863
Enterprise Products Partner LP MLP - Ordinary Income	-7,768	-7,768	-7,768
EQT GP Holdings LP - Ordinary Income	-1,263	-1,263	-1,263
EQT Midstream Partners LP - Ordinary Income	-1,248	-1,248	-1,248
Genesis Energy LP - Ordinary Income	-12,757	-12,757	-12,757
Magellan Midstream Partners LP - Ordinary Income	-2,897	-2,897	-2,897
MPLX LP - Ordinary Income	-2,023	-2,023	-2,023
Phillips 66 Partners LP - Ordinary Income	-3,088	-3,088	-3,088
Plains All American Pipeline LP - Ordinary Income	-2,885	-2,885	-2,885
Shell Midstream Partners LP - Ordinary Income	-3,116	-3,116	-3,116
Sunoco Logistics Partners LP - Ordinary Income	-5,179	-5,179	-5,179
Valero Energy Partners LP - Ordinary Income	-864	-864	-864
Western Gas Equity Partners LP - Ordinary Income	-3,168	-3,168	-3,168
Western Gas Partners LP - Ordinary Income	-4,045	-4,045	-4,045
Energy Transfer Equity LP - Other net rental income	50	50	50
Energy Transfer Equity LP - Royalties	2	2	2
Antero Midstream Partners LP - Net gain (loss) under section 1231	-7	-7	-7
Buckeye Partners LP - Net gain (loss) under section 1231	-105	-105	-105
Dominion Midstream Partners LP - Net gain (loss) under section 1231	-8	-8	-8

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Energy Transfer Equity LP - Net gain (loss) under section 1231	-25	-25	-25
Enlink Midstream Partners LP - Net gain (loss) under section 1231	-239	-239	-239
Enterprise Products Partner LP MLP - Net gain (loss) under section 1231	-136	-136	-136
EQT GP Holdings LP - Net gain (loss) under section 1231	-16	-16	-16
EQT Midstream Partners LP - Net gain (loss) under section 1231	-21	-21	-21
Genesis Energy LP - Net gain (loss) under section 1231	9	9	9
MPLX LP - Net gain (loss) under section 1231	3	3	3
Plains All American Pipeline LP - Net gain (loss) under section 1231	901	901	901
Western Gas Equity Partners LP - Net gain (loss) under section 1231	-75	-75	-75
Western Gas Partners LP - Net gain (loss) under section 1231	-38	-38	-38
Antero Midstream Partners LP - Ordinary Gain	361	361	361
Buckeye Partners LP - Ordinary Gain	806	806	806
Buckeye Partners LP - Ordinary Gain	107	107	107
Dominion Midstream Partners LP - Ordinary Gain	1,198	1,198	1,198
Energy Transfer Equity LP - Ordinary Gain	1,837	1,837	1,837
Enlink Midstream Partners LP - Ordinary Gain	3,230	3,230	3,230
Enterprise Products Partner LP MLP - Ordinary Gain	724	724	724
EQT GP Holdings LP - Ordinary Gain	241	241	241
EQT GP Holdings LP - Ordinary Gain	115	115	115
EQT Midstream Partners LP - Ordinary Gain	911	911	911

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
EQT Midstream Partners LP - Ordinary Gain	174	174	174
Magellan Midstream Partners LP - Ordinary Gain	1,914	1,914	1,914
Phillips 66 Partners LP - Ordinary Gain	1,402	1,402	1,402
Phillips 66 Partners LP - Ordinary Gain	217	217	217
Plains All American Pipeline LP - Ordinary Gain	309	309	309
Shell Midstream Partners LP - Ordinary Gain	1,540	1,540	1,540
Sunoco Logistics Partners LP - Ordinary Gain	1,106	1,106	1,106
Valero Energy Partners LP - Ordinary Gain	550	550	550
Western Gas Equity Partners LP - Ordinary Gain	836	836	836
Western Gas Partners LP - Ordinary Gain	519	519	519
Western Gas Partners LP - Ordinary Gain	470	470	470
Antero Midstream Partners LP - Ordinary Gain	1,995	1,995	1,995
Buckeye Partners LP - Ordinary Gain	2,645	2,645	2,645
Energy Transfer Equity LP - Ordinary Gain	655	655	655
Enlink Midstream Partners LP - Ordinary Gain	433	433	433
Enterprise Products Partner LP MLP - Ordinary Gain	5,065	5,065	5,065
EQT GP Holdings LP - Ordinary Gain	1,101	1,101	1,101
EQT Midstream Partners LP - Ordinary Gain	1,060	1,060	1,060
Genesis Energy LP - Ordinary Gain	15,700	15,700	15,700
Magellan Midstream Partners LP - Ordinary Gain	2,553	2,553	2,553

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
MPLX LP - Ordinary Gain	3,004	3,004	3,004
Phillips 66 Partners LP - Ordinary Gain	1,253	1,253	1,253
Plains All American Pipeline LP - Ordinary Gain	1,592	1,592	1,592
Shell Midstream Partners LP - Ordinary Gain	1,961	1,961	1,961
Sunoco Logistics Partners LP - Ordinary Gain	3,006	3,006	3,006
Valero Energy Partners LP - Ordinary Gain	513	513	513
Western Gas Equity Partners LP - Ordinary Gain	3,657	3,657	3,657
Western Gas Partners LP - Ordinary Gain	3,400	3,400	3,400

TY 2016 Other Liabilities Schedule

Name: MCLANEHARPER CHARITABLE FOUNDATION INC

EIN: 04-2944189

Description	Beginning of Year - Book Value	End of Year - Book Value
UBS - Uncleared Checks	261,500	1,531,833

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TY 2016 Other Professional Fees Schedule

Name: MCLANEHARPER CHARITABLE FOUNDATION INC

EIN: 04-2944189

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
UBS	28,423	28,423		0

TY 2016 Taxes Schedule

Name: MCLANEHARPER CHARITABLE FOUNDATION INC

EIN: 04-2944189

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Federal Taxes	19,997	0		0
Foreign Taxes	1,583	1,583		0
State Taxes	500	500		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** ***www irs gov/form990***

OMB No 1545-0047

2016

Name of the organization	**Employer identification number**
MCLANEHARPER CHARITABLE FOUNDATION INC	04-2944189

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 33 1/3% 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
MCLANEHARPER CHARITABLE FOUNDATION INC

Employer identification number
04-2944189

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	P Andrews McLane 77 Dean Road Weston, MA 02493	$ 1,889,433	Person ☑ Payroll ☐ Noncash ☑ (Complete Part II for noncash contributions)
2	P Andrews McLane 77 Dean Road Weston, MA 02493	$ 104,737	Person ☑ Payroll ☐ Noncash ☑ (Complete Part II for noncash contributions)
3	Linda Harper McLane 77 Dean Road Weston, MA 02493	$ 1,889,433	Person ☑ Payroll ☐ Noncash ☑ (Complete Part II for noncash contributions)
4	Linda Harper McLane 77 Dean Road Weston, MA 02493	$ 104,737	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	Employer identification number
MCLANEHARPER CHARITABLE FOUNDATION INC	04-2944189

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	Tempur Sealy - 27,589 shares	$ 1,889 433	2017-01-04
2	SBA Communications - 1,012 shares	$ 104 737	2017-01-01
3	Tempur Sealy - 27,589 shares	$ 1,889 433	2017-01-04
4	SBA Communications - 1,012 shares	$ 104 737	2017-01-04
		$	
		$	

Name of organization	**Employer identification number**
MCLANEHARPER CHARITABLE FOUNDATION INC	04-2944189

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	