

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.
Go to www.irs.gov/Form990PF for instructions and the latest information

OMB No 1545-0052

2017

Open to Public Inspection

For calendar year 2017 or tax year beginning , 2017, and ending

**FIREBIRD FOUNDATION FOR
ANTHROPOLOGICAL RESEARCH**
PO BOX A
PHILLIPS, ME 04966-1501

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name change

H Check type of organization ☒ Section 501(c)(3) exempt private foundation **03**
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, column (c), line 16)
\$ **17,069,432.**

J Accounting method ☒ Cash ☐ Accrual
☐ Other (specify) _____
(Part I, column (d) must be on cash basis)

A Employer identification number
01-0524375

B Telephone number (see instructions)
207-639-3939

C If exemption application is pending, check here ☐

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

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

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

Part I Analysis of Revenue and Expenses

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

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received (attach schedule)	16,525.			
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments	55,074.	55,074.	55,074.	
4 Dividends and interest from securities	189,489.	189,489.	189,489.	
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	127,393.			
b Gross sales price for all assets on line 6a 3,163,399.				
7 Capital gain net income (from Part IV, line 2)		127,393.		
8 Net short term capital gain			0.	
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)				
SEE STATEMENT 1	-1,087.	-1,087.	-1,087.	
12 Total. Add lines 1 through 11	387,394.	370,869.	243,476.	
13 Compensation of officers, directors, trustees, etc	0.			
14 Other employee salaries and wages	139,853.			139,853.
15 Pension plans, employee benefits	2,331.			2,331.
16a Legal fees (attach schedule)				
b Accounting fees (attach sch) SEE ST 2	4,625.			4,625.
c Other professional fees (attach sch) SEE ST 3	94,990.	44,888.	44,888.	94,990.
17 Interest				
18 Taxes (attach schedule)(see instrs) SEE STM 4	20,347.	4,131.	4,131.	20,347.
19 Depreciation (attach schedule) and depletion SEE STMT 5	11,595.			
20 Occupancy	48,064.			48,064.
21 Travel, conferences, and meetings	3,158.			3,158.
22 Printing and publications				
23 Other expenses (attach schedule)				
SEE STATEMENT 6	45,017.	4,770.	4,770.	45,017.
24 Total operating and administrative expenses. Add lines 13 through 23	369,980.	53,789.	53,789.	358,385.
25 Contributions, gifts, grants paid PART XV	575,074.			405,074.
26 Total expenses and disbursements. Add lines 24 and 25	945,054.	53,789.	53,789.	763,459.
27 Subtract line 26 from line 12.				
a Excess of revenue over expenses and disbursements	-557,660.			
b Net investment income (if negative, enter -0-)		317,080.		
c Adjusted net income (if negative, enter -0-)			189,687.	

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Part II Balance Sheets		Beginning of year (a) Book Value	End of year	
			(b) Book Value	(c) Fair Market Value
ASSETS	1 Cash — non-interest-bearing			
	2 Savings and temporary cash investments	171,225.	89,517.	89,517.
	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 sch)			
	Less: allowance for doubtful accounts			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments — U.S. and state government obligations (attach schedule)			
	b Investments — corporate stock (attach schedule)			
	c Investments — corporate bonds (attach schedule)			
	11 Investments — land, buildings, and equipment basis			
LIABILITIES	Less: accumulated depreciation (attach schedule)			
	12 Investments — mortgage loans			
	13 Investments — other (attach schedule) STATEMENT 7	12,494,350.	12,011,809.	15,988,854.
	14 Land, buildings, and equipment basis 410,230.			
	Less: accumulated depreciation (attach schedule) SEE STMT 8 107,928.	297,413.	302,302.	340,000.
	15 Other assets (describe SEE STATEMENT 9)	570,562.	583,414.	651,061.
	16 Total assets (to be completed by all filers — see the instructions. Also, see page 1, item I)	13,533,550.	12,987,042.	17,069,432.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
NET FUND ASSETS OR FUND BALANCES	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe SEE STATEMENT 10)	7,504.	9,331.	
	23 Total liabilities (add lines 17 through 22)	7,504.	9,331.	
	Foundations that follow SFAS 117, check here and complete lines 24 through 26, and lines 30 and 31. <input checked="" type="checkbox"/>			
	24 Unrestricted	13,526,046.	12,977,711.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input type="checkbox"/>			
	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)	13,526,046.	12,977,711.	
	31 Total liabilities and net assets/fund balances (see instructions)	13,533,550.	12,987,042.	

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	13,526,046.
2	Enter amount from Part I, line 27a	2	-557,660.
3	Other increases not included in line 2 (itemize) SEE STATEMENT 11	3	20,228.
4	Add lines 1, 2, and 3	4	12,988,614.
5	Decreases not included in line 2 (itemize) SEE STATEMENT 12	5	10,903.
6	Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	12,977,711.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a SEE STATEMENT 13				
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				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
a				
b				
c				
d				
e				
2 Capital gain net income or (net capital loss) [If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7]			2	127,393.
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	-21,639.

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 doesn't qualify under section 4940(e). Do not complete this part.

(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))
2016	697,256.	14,759,182.	0.047242
2015	725,653.	15,276,988.	0.047500
2014	775,312.	4,984,100.	0.155557
2013	596,372.	5,365,184.	0.111156
2012	421,074.	3,420,570.	0.123101
2 Total of line 1, column (d)			2 0.484556
3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5 0, or by the number of years the foundation has been in existence if less than 5 years			3 0.096911
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5			4 15,736,675.
5 Multiply line 4 by line 3			5 1,525,057.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 3,171.
7 Add lines 5 and 6			7 1,528,228.
8 Enter qualifying distributions from Part XII, line 4			8 763,459.

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)

1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter 'N/A' on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary – see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here. <input type="checkbox"/> and enter 1% of Part I, line 27b		1	6,342.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)		2	0.
3 Add lines 1 and 2		3	6,342.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	6,342.
6 Credits/Payments			
a 2017 estimated tax pmts and 2016 overpayment credited to 2017	6 a	11,655.	
b Exempt foreign organizations – tax withheld at source	6 b		
c Tax paid with application for extension of time to file (Form 8868)	6 c		
d Backup withholding erroneously withheld	6 d		
7 Total credits and payments. Add lines 6a through 6d	7	11,655.	
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	0.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	5,313.	
11 Enter the amount of line 10 to be: Credited to 2018 estimated tax 5,313. Refunded	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1 a 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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition		X
If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ 0. (2) On foundation managers \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If 'Yes,' attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If 'Yes,' attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, col. (c), and Part XV	X	
8 a Enter the states to which the foundation reports or with which it is registered. See instructions ME		
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 <i>General Instruction G</i> ? If 'No,' attach explanation SEE STATEMENT 14		X
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the tax year beginning in 2017? See the instructions for Part XIV. If 'Yes,' complete Part XIV	X	
10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses		X

Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes,' attach schedule See instructions	11	X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If 'Yes,' attach statement See instructions	12	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>N/A</u>	13	X
14 The books are in care of <u>DR. GEORGE N. APPELL</u> Telephone no <u>207-639-3939</u> Located at <u>PO BOX A, PHILLIPS, ME PHILLIPS ME</u> ZIP + 4 <u>04966-1501</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here <u>N/A</u> and enter the amount of tax-exempt interest received or accrued during the year <u>15</u> <u>N/A</u>		
16 At any time during calendar year 2017, 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	X
See the instructions for exceptions and filing requirements for FinCEN Form 114. If 'Yes,' enter the name of the foreign country <u></u>		

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
1 a 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 <u></u>	1 b	N/A
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 2017?	1 c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? If 'Yes,' list the years <u>20</u> <u></u> <u>20</u> <u></u> <u>20</u> <u></u> <u>20</u> <u></u>	<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)	2 b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <u>20</u> <u></u> <u>20</u> <u></u> <u>20</u> <u></u> <u>20</u> <u></u>		
3 a 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 2017 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 2017)	3 b	N/A
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017?	4 b	X

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5 a** 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

5 b N/A

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

☐**c** If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?N/A ☐ Yes ☐ No

If 'Yes,' attach the statement required by Regulations section 53.4945–5(d)

6 a 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?

6 b X

If 'Yes' to 6b, file Form 8870

7 a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If 'Yes,' did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7 b

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 15		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	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000

0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1 a	14,929,799.
b	Average of monthly cash balances	1 b	143,815.
c	Fair market value of all other assets (see instructions)	1 c	902,706.
d	Total (add lines 1a, b, and c)	1 d	15,976,320.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1 e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	15,976,320.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	239,645.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	15,736,675.
6	Minimum investment return. Enter 5% of line 5	6	786,834.

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	N/A	1	
2 a	Tax on investment income for 2017 from Part VI, line 5	2 a		
b	Income tax for 2017 (This does not include the tax from Part VI)	2 b		
c	Add lines 2a and 2b	2 c		
3	Distributable amount before adjustments. Subtract line 2c from line 1	3		
4	Recoveries of amounts treated as qualifying distributions	4		
5	Add lines 3 and 4	5		
6	Deduction from distributable amount (see instructions)	6		
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7		

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	1 a	763,459.
b	Program-related investments — total from Part IX-B	1 b	
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)	3 a	
b	Cash distribution test (attach the required schedule)	3 b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	763,459.
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	763,459.

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

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Part XIII Undistributed Income (see instructions)

N/A

	(a) Corpus	(b) Years prior to 2016	(c) 2016	(d) 2017
1 Distributable amount for 2017 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2017.				
a Enter amount for 2016 only				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2017:				
a From 2012				
b From 2013				
c From 2014				
d From 2015				
e From 2016				
f Total of lines 3a through e				
4 Qualifying distributions for 2017 from Part XII, line 4: ▶ \$ _____				
a Applied to 2016, but not more than line 2a				
b Applied to undistributed income of prior years (Election required — see instructions)				
c Treated as distributions out of corpus (Election required — see instructions)				
d Applied to 2017 distributable amount				
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
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				
d Subtract line 6c from line 6b Taxable amount — see instructions				
e Undistributed income for 2016 Subtract line 4a from line 2a Taxable amount — see instructions				
f Undistributed income for 2017 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2018				
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)				
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2013				
b Excess from 2014				
c Excess from 2015				
d Excess from 2016				
e Excess from 2017				

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

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2017, enter the date of the ruling					8/30/00
b Check box to indicate whether the foundation is a private operating foundation described in section	<input checked="" type="checkbox"/> 4942(j)(3) or				<input type="checkbox"/> 4942(j)(5)
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
	(a) 2017	(b) 2016	(c) 2015	(d) 2014	
	189,687.	192,674.	158,849.	249,205.	790,415.
b 85% of line 2a.	161,234.	163,773.	135,022.	211,824.	671,853.
c Qualifying distributions from Part XII, line 4 for each year listed	763,459.	697,256.	725,653.	477,413.	2,663,781.
d Amounts included in line 2c not used directly for active conduct of exempt activities					0.
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c	763,459.	697,256.	725,653.	477,413.	2,663,781.
3 Complete 3a, b, or c for the alternative test relied upon:					
a 'Assets' alternative test — enter:					
(1) Value of all assets	17,069,432.	15,404,331.	14,995,010.	16,216,239.	63,685,012.
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					0.
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 foundation 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))
GEORGE N APPELL
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
NONE
2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:
Check here <input checked="" type="checkbox"/> 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. to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions.
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	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 SEE STATEMENT 16				
Total			3 a	575,074.
b Approved for future payment				
Total			3 b	

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

- Attach to Form 990, Form 990-EZ, or Form 990-PF.
► Go to www.irs.gov/Form990 for the latest information.

OMB No 1545-0047

2017

Name of the organization **FIREBIRD FOUNDATION FOR
ANTHROPOLOGICAL RESEARCH**

Employer identification number
01-0524375

Organization type (check one)

Filers of:

Form 990 or 990-EZ

Section:

- ☐ 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 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. Don't 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 isn't covered by the General Rule and/or the Special Rules doesn't 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 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

BAA For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF

Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

Name of organization

Employer identification number

FIREBIRD FOUNDATION FOR

01-0524375

Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	AMERICAN FRIENDS OF THE RAI PO BOX A PHILLIPS, ME 04966	\$ 10,000	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization

Employer identification number

FIREBIRD FOUNDATION FOR

01-0524375

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
	N/A		
		\$	
(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
		\$	

BAA

Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

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FIREBIRD FOUNDATION FOR
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STATEMENT 1
FORM 990-PF, PART I, LINE 11
OTHER INCOME

	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
PARTNERSHIP INCOME	\$ -1,087.		
TOTAL	\$ -1,087.	\$ 0.	\$ 0.

STATEMENT 2
FORM 990-PF, PART I, LINE 16B
ACCOUNTING FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	\$ 4,625.			\$ 4,625.
TOTAL	\$ 4,625.	\$ 0.	\$ 0.	\$ 4,625.

STATEMENT 3
FORM 990-PF, PART I, LINE 16C
OTHER PROFESSIONAL FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BANK FEES	\$ 2,040.			\$ 2,040.
CONSULTING FEES	48,062.			48,062.
INVESTMENT FEES	44,888.	\$ 44,888.	\$ 44,888.	44,888.
TOTAL	\$ 94,990.	\$ 44,888.	\$ 44,888.	\$ 94,990.

STATEMENT 4
FORM 990-PF, PART I, LINE 18
TAXES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	\$ 4,131.	\$ 4,131.	\$ 4,131.	\$ 4,131.
PAYROLL TAXES	10,602.			10,602.
REAL ESTATE	5,614.			5,614.
TOTAL	\$ 20,347.	\$ 4,131.	\$ 4,131.	\$ 20,347.

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STATEMENT 5
FORM 990-PF, PART I, LINE 19
ALLOCATED DEPRECIATION

DATE ACQUIRED	COST BASIS	PRIOR YR DEPR	METHOD	RATE	LIFE	CURRENT YR DEPR	NET INVEST INCOME	ADJUSTED NET INCOME
BUILDING 10/01/10	283,986	44,375	S/L		40	7,100	0	0
FURNITURE AND FIXTURES 10/01/10	20,228	12,643	S/L		10	2,023	0	0
BUILDING IMPROVEMENTS 10/01/11	4,045	530	S/L		40	101	0	0
BUILDING IMPROVEMETS 7/13/11	7,827	1,054	S/L		40	196	0	0
FURNISHINGS 10/01/11	4,803	2,521	S/L		10	480	0	0
GENERATOR 8/17/15	7,651	2,295	S/L		5	1,530	0	0
WELL 9/30/17	16,484		S/L		25	165	0	0

STATEMENT 6
FORM 990-PF, PART I, LINE 23
OTHER EXPENSES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
AMORTIZATION	\$ 4,770.	\$ 4,770.	\$ 4,770.	\$ 4,770.
COMPUTER REPAIRS	1,259.			1,259.
DUES AND SUBSCRIPTIONS	2,445.			2,445.
EMPLOYEE BENEFITS-INSURANCE	3,144.			3,144.
INSURANCE-W/COMP	511.			511.
MISCL	1,646.			1,646.
OFFICE SUPPLIES	2,731.			2,731.
PROJECT SUPPORT	5,775.			5,775.
REFERENCE MATERIALS	901.			901.
RENTAL EXPENSES	16,402.			16,402.
SUPPLIES	918.			918.
TELEPHONE/INTERNET	3,229.			3,229.
TRAINING	234.			234.
WEBSITE	1,052.			1,052.
TOTAL	\$ 45,017.	\$ 4,770.	\$ 4,770.	\$ 45,017.

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STATEMENT 7
FORM 990-PF, PART II, LINE 13
INVESTMENTS - OTHER

	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
<u>OTHER INVESTMENTS</u>			
BROWN ADVISORY	COST	\$ 11,973,111.	\$ 15,947,984.
SPC LLC'S RESIDUAL VALUE	COST	38,698.	40,870.
	TOTAL	<u>\$ 12,011,809.</u>	<u>\$ 15,988,854.</u>

STATEMENT 8
FORM 990-PF, PART II, LINE 14
LAND, BUILDINGS, AND EQUIPMENT

CATEGORY	BASIS	ACCUM. DEPREC.	BOOK VALUE	FAIR MARKET VALUE
FURNITURE AND FIXTURES	\$ 40,266.	\$ 29,076.	\$ 11,190.	\$ 0.
MACHINERY AND EQUIPMENT	23,749.	23,749.	0.	0.
BUILDINGS	295,858.	53,355.	242,503.	310,000.
IMPROVEMENTS	18,067.	1,748.	16,319.	0.
LAND	32,290.		32,290.	30,000.
TOTAL	<u>\$ 410,230.</u>	<u>\$ 107,928.</u>	<u>\$ 302,302.</u>	<u>\$ 340,000.</u>

STATEMENT 9
FORM 990-PF, PART II, LINE 15
OTHER ASSETS

	BOOK VALUE	FAIR MARKET VALUE
CASH SURRENDER VALUE LIFE INS.	\$ 571,664.	\$ 639,311.
OTHER ASSETS	95.	95.
PREPAID TAXES	11,655.	11,655.
TOTAL	<u>\$ 583,414.</u>	<u>\$ 651,061.</u>

STATEMENT 10
FORM 990-PF, PART II, LINE 22
OTHER LIABILITIES

ACCRUALS	\$ 7,000.
PAYROLL TAXES DUE	2,331.
TOTAL	<u>\$ 9,331.</u>

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STATEMENT 11
FORM 990-PF, PART III, LINE 3
OTHER INCREASES

INCREASE IN CASH SURRENDER VALUE	\$	16,915.
MISCL		41.
NON DIVIDEND DISTRIBUTIONS		3,272.
TOTAL	\$	<u>20,228.</u>

STATEMENT 12
FORM 990-PF, PART III, LINE 5
OTHER DECREASES

FEDERAL INCOME TAX ACCRUAL	\$	7,000.
NON-DEDUCTIBLE EXPENSES		3,903.
TOTAL	\$	<u>10,903.</u>

STATEMENT 13
FORM 990-PF, PART IV, LINE 1
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM	(A) DESCRIPTION	(B) HOW ACQUIRED	(C) DATE ACQUIRED	(D) DATE SOLD
1	111 BEST BUY INC	PURCHASED	2/10/2016	2/03/2017
2	365 CARMAX	PURCHASED	VARIOUS	2/08/2017
3	11 CHIPOLTE	PURCHASED	7/25/2017	11/22/2017
4	33 DISNEY WALT CO	PURCHASED	8/17/2016	3/07/2017
5	2537 HANESBRANDS INC.	PURCHASED	2/02/2017	12/22/2017
6	4000 PRICELINE GROUP	PURCHASED	VARIOUS	2/08/2017
7	216 SPDR S&P 500 ETF TRUST	PURCHASED	11/22/2017	12/26/2017
8	872 TEVA PHARMACEUTICALS	PURCHASED	VARIOUS	8/03/2017
9	40 UNITED RENTALS	PURCHASED	8/17/2016	5/16/2017
10	157 CANADIAN NATL RY CO	PURCHASED	2/10/2016	2/03/2017
11	70 YAHOO INC	PURCHASED	8/17/2016	5/16/2017
12	95 AETNA	PURCHASED	6/16/2016	11/20/2017
13	149 AETNA	PURCHASED	VARIOUS	12/05/2017
14	65 ANTHEM INC	PURCHASED	2/10/2016	4/19/2017
15	494 BEST BUY INC	PURCHASED	2/10/2016	3/24/2017
16	108 CANADIAN NATL RY CO	PURCHASED	2/10/2016	3/24/2017
17	299 CARMAX	PURCHASED	VARIOUS	7/28/2017
18	191 CHIPOLTE	PURCHASED	VARIOUS	11/22/2017
19	17 DISNEY WALT CO	PURCHASED	2/10/2016	3/07/2017
20	157 DISNEY WALT CO	PURCHASED	2/10/2016	7/31/2017
21	353 EXPRESS SCRIPTS	PURCHASED	2/10/2016	4/25/2017
22	200 EXPRESS SCRIPTS	PURCHASED	9/26/2013	10/17/2017
23	100 EXPRESS SCRIPTS	PURCHASED	9/27/2013	10/17/2017
24	100 EXPRESS SCRIPTS	PURCHASED	9/30/2013	10/17/2017
25	200 EXPRESS SCRIPTS	PURCHASED	10/02/2013	10/17/2017
26	365 EXPRESS SCRIPTS	PURCHASED	2/10/2016	10/17/2017
27	137 PRICE T ROWE GRP INC	PURCHASED	2/10/2016	7/12/2017
28	189 PRICE T ROWE GRP INC	PURCHASED	2/10/2016	7/31/2017
29	5 PRICELINE GROUP	PURCHASED	2/10/2016	3/17/2017
30	4 PRICELINE GROUP	PURCHASED	2/10/2016	4/05/2017
31	3 PRICELINE GROUP	PURCHASED	2/10/2016	5/03/2017
32	158 QUALCOMM INCORPORATED	PURCHASED	VARIOUS	11/03/2017
33	501 TEVA PHARMACEUTICALS	PURCHASED	VARIOUS	8/03/2017

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STATEMENT 13 (CONTINUED)
FORM 990-PF, PART IV, LINE 1
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM	(A) DESCRIPTION	(B) HOW ACQUIRED	(C) DATE ACQUIRED	(D) DATE SOLD
34	90 TJX COS	PURCHASED	2/10/2016	3/08/2017
35	61 UNITED RENTALS	PURCHASED	2/10/2016	3/07/2017
36	6 UNITED RENTALS	PURCHASED	2/10/2016	4/04/2017
37	57 UNITED RENTALS	PURCHASED	2/10/2016	10/13/2017
38	31 UNITED RENTALS	PURCHASED	2/10/2016	12/20/2017
39	63 YAHOO INC	PURCHASED	2/10/2016	5/16/2017
40	1795 ISHARES TR RESID R EST CAP	PURCHASED	VARIOUS	6/28/2017
41	846 SPDR S&P 500 ETF TRUST	PURCHASED	6/09/2015	5/18/2017
42	975 SPDR S&P 500 ETF TRUST	PURCHASED	6/09/2015	11/10/2017
43	PRINC DRIVE AUTO	PURCHASED	6/21/2017	12/15/2017
44	50,000 FIDELITY NAT'L INFORMATION	PURCHASED	5/12/2016	3/20/2017
45	16,000 HUNT JB TRANS SVC NOTE	PURCHASED	3/22/2016	3/20/2017
46	30,000 PRINC MERCEDES BENZ	PURCHASED	3/30/2017	12/15/2017
47	PRINC NISSAN MTRS	PURCHASED	4/19/2017	12/15/2017
48	PRINC NISSAN MTRS	PURCHASED	3/30/2016	3/15/2017
49	PRINC SANTANDER DRIVE	PURCHASED	4/11/2017	12/15/2017
50	PRINC TOYOTA	PURCHASED	4/24/2017	12/15/2017
51	360,000 US TREAS NOTES	PURCHASED	10/23/2017	12/11/2017
52	15,000 US TREAS NOTES	PURCHASED	3/31/2017	4/25/2017
53	5,000 US TREAS NOTES	PURCHASED	3/31/2017	4/26/2017
54	5,000 US TREAS NOTES	PURCHASED	3/31/2017	5/09/2017
55	55,000 US TREAS NOTES	PURCHASED	3/31/2017	5/10/2017
56	340,000 US TREAS NOTES	PURCHASED	3/31/2017	10/23/2017
57	20,000 US TREAS NOTES	PURCHASED	3/31/2017	10/23/2017
58	45,000 AMERICAN CENT FOX	PURCHASED	VARIOUS	3/20/2017
59	55,000 PRINC AMERICREDIT	PURCHASED	5/09/2017	12/15/2017
60	25,000 ANALOG DEVICES	PURCHASED	9/17/2016	3/20/2017
61	55,000 ASTRAZENECA	PURCHASED	3/30/2017	7/28/2017
62	5,000 CAMPBELL SOUP	PURCHASED	8/11/2016	3/30/2017
63	70,000 CANADIAN NAT RES	PURCHASED	10/27/2016	3/13/2017
64	45,000 CLOROX	PURCHASED	VARIOUS	3/20/2017
65	100,000 AMERICAN CENT FOX	PURCHASED	10/21/2015	10/19/2017
66	70,000 AUTOZONE	PURCHASED	VARIOUS	3/20/2017
67	50,000 BANK OF AMERICA	PURCHASED	3/10/2014	3/20/2017
68	125000 BOSTON PPTYS INC	PURCHASED	VARIOUS	2/10/2017
69	15,000 CAMPBELL SOUP	PURCHASED	2/08/2016	3/20/2017
70	4,000 CAMPBELL SOUP	PURCHASED	2/08/2016	12/20/2017
71	2,000 CAMPBELL SOUP	PURCHASED	2/18/2016	12/29/2017
72	45,000 CC HLDGS GS LLC	PURCHASED	11/13/2015	9/20/2017
73	175,000 FORD MOTOR CREDIT	PURCHASED	11/18/2015	1/17/2017
74	45,000 HEALTHCARE TRUST OF AMER	PURCHASED	10/07/2015	3/20/2017
75	29,000 JB HUNT TRASPORT SVCS 3.3%	PURCHASED	3/03/2016	3/20/2017
76	70,000 MORGAN STANLEY	PURCHASED	VARIOUS	3/20/2017
77	PRINC NISSAN MTRS	PURCHASED	3/30/2016	12/15/2017
78	65,000 VERIZON COMM INC	PURCHASED	1/20/2016	3/20/2017
79	CAPITAL GAIN DISTRIBUTIONS	PURCHASED	VARIOUS	12/31/2017
80	K-1 SPC	PURCHASED	VARIOUS	12/31/2017
81	K-1 SPC	PURCHASED	VARIOUS	12/31/2017

ITEM	(E) GROSS SALES	(F) DEPREC. ALLOWED	(G) COST BASIS	(H) GAIN (LOSS)	(I) FMV 12/31/69	(J) ADJ. BAS. 12/31/69	(K) EXCESS (I) - (J)	(L) GAIN (LOSS)
1	4,968.		3,051.	1,917.				\$ 1,917.
2	24,165.		19,796.	4,369.				4,369.
3	3,095.		3,838.	-743.				-743.

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CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM	(E) GROSS SALES	(F) DEPREC. ALLOWED	(G) COST BASIS	(H) GAIN (LOSS)	(I) FMV 12/31/69	(J) ADJ. BAS. 12/31/69	(K) EXCESS (I) - (J)	(L) GAIN (LOSS)
4	3,658.		3,193.	465.			\$ 465.	
5	51,463.		59,458.	-7,995.				-7,995.
6	6,413.		4,362.	2,051.				2,051.
7	57,700.		56,112.	1,588.				1,588.
8	25,989.		47,373.	-21,384.				-21,384.
9	4,482.		1,838.	2,644.				2,644.
10	10,898.		8,626.	2,272.				2,272.
11	3,575.		2,985.	590.				590.
12	16,622.		11,521.	5,101.				5,101.
13	26,820.		18,050.	8,770.				8,770.
14	10,835.		7,955.	2,880.				2,880.
15	22,241.		13,578.	8,663.				8,663.
16	8,706.		5,934.	2,772.				2,772.
17	19,964.		14,315.	5,649.				5,649.
18	53,740.		78,553.	-24,813.				-24,813.
19	1,884.		1,523.	361.				361.
20	17,264.		14,061.	3,203.				3,203.
21	20,860.		24,134.	-3,274.				-3,274.
22	11,421.		12,449.	-1,028.				-1,028.
23	5,710.		6,202.	-492.				-492.
24	5,710.		6,157.	-447.				-447.
25	11,421.		12,390.	-969.				-969.
26	20,843.		24,955.	-4,112.				-4,112.
27	10,362.		9,222.	1,140.				1,140.
28	15,651.		12,722.	2,929.				2,929.
29	8,685.		5,213.	3,472.				3,472.
30	7,093.		4,170.	2,923.				2,923.
31	5,608.		3,128.	2,480.				2,480.
32	9,894.		7,311.	2,583.				2,583.
33	45,773.		105,459.	-59,686.				-59,686.
34	7,074.		6,302.	772.				772.
35	7,857.		2,803.	5,054.				5,054.
36	745.		276.	469.				469.
37	8,245.		2,619.	5,626.				5,626.
38	5,200.		1,425.	3,775.				3,775.
39	3,217.		1,737.	1,480.				1,480.
40	118,476.		87,702.	30,774.				30,774.
41	200,335.		176,408.	23,927.				23,927.
42	251,343.		203,307.	48,036.				48,036.
43	13,975.		13,975.	0.				0.
44	54,117.		55,639.	-1,522.				-1,522.
45	16,199.		16,187.	12.				12.
46	30,000.		29,998.	2.				2.
47	10,814.		10,798.	16.				16.
48	19,986.		19,986.	0.				0.
49	71,782.		71,886.	-104.				-104.
50	30,833.		30,830.	3.				3.
51	359,916.		359,944.	-28.				-28.
52	14,983.		14,985.	-2.				-2.
53	4,994.		4,995.	-1.				-1.
54	4,993.		4,995.	-2.				-2.
55	54,920.		54,946.	-26.				-26.
56	339,973.		339,615.	358.				358.

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STATEMENT 13 (CONTINUED)
FORM 990-PF, PART IV, LINE 1
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM	(E) GROSS SALES	(F) DEPREC. ALLOWED	(G) COST BASIS	(H) GAIN (LOSS)	(I) FMV 12/31/69	(J) ADJ. BAS. 12/31/69	(K) EXCESS (I) - (J)	(L) GAIN (LOSS)
57	19,998.		19,980.	18.			\$ 18.	
58	44,795.		46,992.	-2,197.			-2,197.	
59	55,000.		55,000.	0.			0.	
60	25,450.		26,772.	-1,322.			-1,322.	
61	56,510.		55,415.	1,095.			1,095.	
62	4,909.		5,125.	-216.			-216.	
63	69,155.		71,287.	-2,132.			-2,132.	
64	45,735.		47,102.	-1,367.			-1,367.	
65	7,408.		0.	7,408.			7,408.	
66	72,210.		71,579.	631.			631.	
67	54,171.		53,144.	1,027.			1,027.	
68	131,959.		129,089.	2,870.			2,870.	
69	14,728.		14,758.	-30.			-30.	
70	3,950.		3,935.	15.			15.	
71	1,977.		1,968.	9.			9.	
72	45,954.		44,408.	1,546.			1,546.	
73	5,464.		5,458.	6.			6.	
74	45,571.		45,150.	421.			421.	
75	29,360.		29,419.	-59.			-59.	
76	72,019.		71,654.	365.			365.	
77	54,671.		54,672.	-1.			-1.	
78	62,499.		62,107.	392.			392.	
79	56,164.		0.	56,164.			56,164.	
80	2.		0.	2.			2.	
81	250.		0.	250.			250.	
							TOTAL \$ 127,393.	

STATEMENT 14
FORM 990-PF, PART VII-A, LINE 8B
COPIES OF FORM 990-PF TO STATE OFFICIALS

REPORT NOT REQUIRED

STATEMENT 15
FORM 990-PF, PART VIII, LINE 1
LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION	CONTRI- BUTION TO EBP & DC	EXPENSE ACCOUNT/ OTHER
GEORGE N APPELL PO BOX A PHILLIPS, ME 04966	PRESIDENT 0	\$ 0.	\$ 0.	0.

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STATEMENT 15 (CONTINUED)
FORM 990-PF, PART VIII, LINE 1
LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION	CONTRI- BUTION TO EBP & DC	EXPENSE ACCOUNT/ OTHER
LAURA P.A. WARREN ST MARKS SCHOOL SOUTHBOROUGH, MA 01772	SEC./TREASURER 0	\$ 0.	\$ 0.	\$ 0.
AMITY A DOOLITTLE 119 EVERIT STREET NEW HAVEN, CT 06511	DIRECTOR 0	0.	0.	0.
CHARITY R APPELL MCNABB PO BOX 248 ASCUTNEY, VT 05030	DIRECTOR 0	0.	0.	0.
ANTON PLOEG G.SLAGMASTER 9,7217 SE HARFSEN, NETHERLANDS	DIRECTOR 0	0.	0.	0.
VINSON H SUTLIVE, JR 122 WARE ROAD WILLIAMSBURG, VA 22318	DIRECTOR 0	0.	0.	0.
TOTAL		\$ 0.	\$ 0.	\$ 0.

STATEMENT 16
FORM 990-PF, PART XV, LINE 3A
RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
ADENESIA, AYENI BLOCK N40 FLAT 7 LAGOS NIGERIA	NONE	I	ANTHROPOLOGICAL RESEARCH	\$ 2,061.
AIGBOKHAI, OJO 53 JAMES WATT RD AUCHI EDO STATE NIGERIA	NONE	I	ANTHROPOLOGICAL RESEARCH	10,000.
ARNOLD, LAURA 910 MONCRIEFF TERRACE EDINBURGH EH9 1NB UNITED KINGDOM	NONE	I	ANTHROPOLOGICAL RESEARCH	5,899.
BAREH, CURIUSLY CEN. UNIV. KERALA, VIDYANAGAR CAMP. KERALA KASARAGOD 671123 INDIA	NONE	I	ANTHROPOLOGICAL RESEARCH	3,300.

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FORM 990-PF, PART XV, LINE 3A
RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
BERGE, ANNA 3688 KEYSTONE RD FAIRBANKS AK 99709	NONE	I	ANTHROPOLOGICAL RESEARCH	\$ 10,000.
BHATTACHARYA, BIKISH TEZPUR UNIV., NAPAM ASSAM 784028 INDIA	NONE	I	ANTHROPOLOGICAL RESEARCH	6,450.
T'ARHESI, NIKU 3206 W 134TH ST HAWTHORNE CA 90250	NONE	I	ANTHROPOLOGICAL RESEARCH	7,940.
BORA, ANKITA DHEKIAKHOWA GAON ASSAM INDIA	NONE	I	ANTHROPOLOGICAL RESEARCH	5,900.
BORDOLOI, MANAS J HOUSE NO. 62 SHANTI PATH ASSAM 782402 INDIA	NONE	I	ANTHROPOLOGICAL RESEARCH	10,000.
CASTELNUOVO, NATALIA 1426 CAPITAL FEDERAL CONCEPCION 2612 5 CHILE	NONE	I	ANTHROPOLOGICAL RESEARCH	7,098.
CONG, SHAN NO 94 RD WEIJIN, NANKAI TIANJIN CHINA	NONE	I	ANTHROPOLOGICAL RESEARCH	7,843.
DEL MAR, CABEZA, J MARIA MAR CABEZA, PRINSESSANTE 1A VANTAA 01301 FINLAND	NONE	I	ANTHROPOLOGICAL RESEARCH	7,000.
ECHEVERRIA, RODRIGO 3629 10TH STREET NW WASHINGTON DC 20010	NONE	I	ANTHROPOLOGICAL RESEARCH	9,995.
DEVI, NINGOMBAM SINJAMEI MAKHA KHONGNANGPHEIDKPI MANIPUR 795008 INDIA	NONE	I	ANTHROPOLOGICAL RESEARCH	6,850.
EPSTEIN, KATHLEEN 119 QUILLEN CT #200 STANFORD CA 94305	NONE	I	ANTHROPOLOGICAL RESEARCH	6,400.
ESBACH, MICHAEL 509 HUNT FIELD RD MANAKIN SABOT VA 23103	NONE	I	ANTHROPOLOGICAL RESEARCH	10,000.

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STATEMENT 16 (CONTINUED)
FORM 990-PF, PART XV, LINE 3A
RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
FELD, STEVEN 7719 OLD SANTA FE TRAIL SANTA FE NM 87505	NONE	I	ANTHROPOLOGICAL RESEARCH	\$ 10,000.
HARVEY, ANDREW LONDON HOUSE, GOODENOUGH COLLEGE LONDON WCIN 2AB UNITED KINGDOM	NONE	I	ANTHROPOLOGICAL RESEARCH	10,000.
HENIESE, MICHAEL THE KOHIMA INST. KOHIMA-MELURI RD MANIPUR CHANDEL 795103 INDIA	NONE	I	ANTHROPOLOGICAL RESEARCH	10,000.
BIESELE, MEGAN 3107 GREENLAWN PARKWAY AUSTIN TX 78756	NONE	I	ANTHROPOLOGICAL RESEARCH	9,900.
KHALING, TEDANSHIM KANGSHIM VILLAGE MANIPUR CHANDEL 795103 INDIA	NONE	I	ANTHROPOLOGICAL RESEARCH	5,100.
KHAN, ABDUL QADIR UNIV. OD AZAD JUMMU & KASHMIR MUZAFFARBAD AZZAD KASHMIR 13100 PAKISTAN	NONE	I	ANTHROPOLOGICAL RESEARCH	9,760.
KONNERTH, LINDA HARTSIT ST 14/8 MODIN 7171573 ISRAEL	NONE	I	ANTHROPOLOGICAL RESEARCH	5,620.
LONGDET, ISHAYA Y MAZARAM-TOPP RAYFIELD JOS PLATEAU STATE NIGERIA	NONE	I	ANTHROPOLOGICAL RESEARCH	7,607.
MALANGA, DANIEL PO BOX 37 LIVINGSTONIA BARPETS ASSAM INDIA	NONE	I	ANTHROPOLOGICAL RESEARCH	6,797.
NATH, SAURABH KUMAR DASHKIN GNAK GARI, PO & PS-SORBORG BARPETS ASSAM INDIA	NONE	I	ANTHROPOLOGICAL RESEARCH	9,200.

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RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
OBERT, KAROLIN AVENIA DUQUE DE CAXIAS, 181-AP 1004 SAO PAULO 01214-100 BRAZIL	NONE	I	ANTHROPOLOGICAL RESEARCH	\$ 9,832.
EYIANGBO, AJORITSEDERE 10 EREKU ST WARRI DELTA STATE NIGERIA	NONE	1	CONSERVATION 501 (C) (3)	6,252.
OLUTOYIN, JEGEDE UNIV OF IBADAN DEPT OF ENGLISH IBADAN IBADAN NIGERIA	NONE	1	ANTHROPOLOGICAL RESEARCH	8,405.
OMOFE, BLESSING 2 AKPOVI AVENUE WARRI DELTA STATE NIGERIA	NONE	1	ANTHROPOLOGICAL RESEARCH	9,330.
OBI, HELEN 253 WARRI/SEPEL RD WARRI DELTA STATE NIGERIA	NONE	I	ANTHROPOLOGICAL RESEARCH	9,450.
OSARENSE, IYAMU 8 OGIEMUDIA ST BENIN CITY EDO STATE NIGERIA	NONE	I	ANTHROPOLOGICAL RESEARCH	8,823.
IFESIEH, EMEKA 10 IFESIEH CLOSE. OBIARKU DELTA STATE NIGERIA	NONE	1	ANTHROPOLOGICAL RESEARCH	9,531.
OYI, TAMUT G SECTOR PAPUM PARE ARUNACHA PRADESH 791110 INDIA	NONE	1	ANTHROPOLOGICAL RESEARCH	8,095.
PENG, RUIJIE 3569 LAKE AUSTIN BLVD AUSTIN TX 78703	NONE	1	ANTHROPOLOGICAL RESEARCH	9,400.
RICE, MARGOT 4932 JACOBS ROAD MARIPOSA CA 95338	NONE	1	ANTHROPOLOGICAL RESEARCH	10,000.
RODRIGUEZ, IVETH DIAGONA 49#13-16 OSETE BOGOTA CALLE COLOMBIA	NONE	I	ANTHROPOLOGICAL RESEARCH	8,356.

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FORM 990-PF, PART XV, LINE 3A
RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
ROWAN, KIRSTY 17A FREDERICK ST LONDON WC1F 0NF UNITED KINGDOM		1	ANTHROPOLOGICAL RESEARCH	\$ 9,485.
SAHIINII, LEMANIA UPPER KOIDE VILLAGE MANIPUR 795105 INDIA	NONE	1	ANTHROPOLOGICAL RESEARCH	7,025.
SINGH, WAHENGAM TOUBOUL MAKHA LEIKAI MANIPUR 795126 INDIA	NONE	1	ANTHROPOLOGICAL RESEARCH	6,581.
TASAM 18 KHOROO 13TH MICRO ULAANBAATAR BAYANZURKH DISTRICT 13 13 74 MONGOLIA	NONE	NC	ANTHROPOLOGICAL RESEARCH	10,000.
TRBUR, ZOE 1680 WALNUT STREET EUGENE OR 97403	NONE	1	ANTHROPOLOGICAL RESEARCH	17,487.
VINOGRADOV, IGOR 11 PARKOVAYA 52-4-37 MOSCOW 105215 RUSSIA	NONE	1	ANTHROPOLOGICAL RESEARCH	5,300.
WAMBACH, LAUREN 507 N. WILLIAMS DR PALATINE IL 60074	NONE	I	ANTHROPOLOGICAL RESEARCH	7,154.
UNIVERSITY OF WELLINGTON KELBURN PARADE WELLINGTON 6012 NEW ZEALAND	NONE	NC	ANTHROPOLOGICAL RESEARCH	4,190.
TINSHEN, ZHOU Z. HONGSHEN ROAD DALI YUNNAN 671003 CHINA	NONE	1	ANTHROPOLOGICAL RESEARCH	9,658.
MAINE MOUNTAIN COLLABORATIVE PO BOX A PHILLIPS ME 04966		PC	CONSERVATION	170,000.
FOREST SOCIETY OF MAINE 115 FRANKLIN STREET BANGOR ME 04401		PC	CONSERVATION	30,000.

TOTAL \$ 575,074.