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.

For	calen	dar year 2017 or tax year	beginning		, and ending		
Nai	ne of	foundation				A Employer identification	n number
		OLINE C. LEV				02-6101659)
		nd street (or P O box number i		• •	Room/suite	B Telephone number	4
_		TRAFALGAR SC				603-883-55	501
		own, state or province, cou		ostal code		C If exemption application is p	pending, check here
	_	HUA, NH 030				1	
G (Check	all that apply:	Initial return	_	ormer public charity	D 1. Foreign organization	s, check here
		닐	Final return	Amended return		Foreign organizations months check here and attach control in the control in	eeting the 85% test,
			Address change	Name_change	1	check here and attach c	omputation
H	¬₁		X Section 501(c)(3) ex			E If private foundation sta	. (- 1
	_	ction 4947(a)(1) nonexem	·	Other taxable private founda	Assurat W	under section 507(b)(1	
		arket value of all assets at e		ng method: X Cash	Accrual \\	F If the foundation is in a	
-	om ⊢ -\$	Part II, col. (c), line 16)	UL UI	her (specify) nn (d) must be on cash basi	c)	under section 507(b)(1)(B), check here
	art l					(a) Advicated not	(d) Disbursements
_	1111	(The total of amounts in columnecessarily equal the amount	mns (b), (c), and (d) may not	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	for charitable purposes (cash basis only)
	1	Contributions, gifts, grant	•			N/A	<u> </u>
	2	Check X if the foundation					
1	3	cash investments	•				
	4	Dividends and interest fro	om securities	121,499.	121,499.		STATEMENT 1
		Gross rents					
	١.	Net rental income or (loss)		14 650			
ne	ba	Net gain or (loss) from sale of a Gross sales price for all		14,659.			
Revenue	_b	assets on line 6a	928,714.		14,659.		
Re	7	Capital gain net income (from	•		14,035.		
	8	Net short-term capital gai Income modifications	11				
	102	Gross sales less returns and allowances				· · · · · · · · · · · · · · · · · · ·	
	Ι.	Less Cost of goods sold					
	1	Gross profit or (loss)					
	11	Other income		3,019.	3,019.		STATEMENT 2
	12	Total Add lines 1 throug	h 11	139,177.	139,177.		
	13	Compensation of officers, dire	ectors, trustees, etc	0.	0.		0.
	14	Other employee salaries a	and wages			RECEIV	ED .
	15	Pension plans, employee	benefits			6	78
ses	16a	Legal fees	STMT 3	5,975.	0.		018 9 0.
pen	Ь	Accounting fees				(C)	8
Ä	C	Other professional fees	STMT 4	15,065.	0.	OGDEN	UT 0.
and Administrative Expenses	17	Interest	am	4 4 4 4			
itra	18	Taxes	STMT 5	1,161.	0.		0.
Ĭ	19	Depreciation and depletio	П	22 000			
μÞ	20	Occupancy Travel, conferences, and i	maatinga	23,809.	0.		0.
β	21	Printing and publications	ເມເຊຍແກ່ຊີວ				
jar	23	Other expenses	STMT 6	312.	0.		0.
Operating		Total operating and adm			<u> </u>		J.
era	• •	expenses. Add lines 13 ti		46,322.	0.		0.
Ö	25	Contributions, gifts, grant	_	530,000.			530,000.
	1	Total expenses and disb		3007000	·····	***	333,000
	-	Add lines 24 and 25		576,322.	0.		530,000.
	27	Subtract line 26 from line	12:				
		Excess of revenue over expen-		<437,145.	>		
	b	Net investment income (f negative, enter -0-)		139,177.		
_	C	Adjusted net income (if ne	egative, enter -0-)			N/A	

rol	m 99	0-PF(2017) CAROLINE C. LEVINE CHAR			101659 Page 2
P	art	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End of y	
_			(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing	15,535.	11,672.	11,672.
	1	Savings and temporary cash investments	526,761.	292,439.	<u>292,439.</u>
	3	Accounts receivable ►			
		Less: allowance for doubtful accounts ▶			
	4	Pledges receivable ►		İ	
		Less: allowance for doubtful accounts			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
		disqualified persons			
	7	Other notes and loans receivable	l		
	ľ	Less; allowance for doubtful accounts ▶			
ţ	8	Inventories for sale or use			
Assets	9	Prepaid expenses and deferred charges			
ä	10a	Investments - U.S. and state government obligations STMT 7	330,000.	330,000.	475,802.
	b	Investments - corporate stock			
	C	Investments - corporate bonds			
	11	Investments - land, buildings, and equipment basis			
	}	Less accumulated depreciation			
	12	Investments - mortgage loans			
	13	Investments - other STMT 8	4,453,130.	4,254,170.	4,862,566.
	14	Land, buildings, and equipment: basis ▶			-1
		Less accumulated depreciation			
	15	Other assets (describe ►			
	1	Total assets (to be completed by all filers - see the	·		
	.	instructions. Also, see page 1, item I)	5,325,426.	4,888,281.	5,642,479.
	17	Accounts payable and accrued expenses	3,323,420.	1 700072011	3/042/4/31
	18	Grants payable			
ιń	19	Deferred revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
Ď	21	Mortgages and other notes payable			
Ë		Other liabilities (describe)			
	122	Other Habilities (4636HbC)			
	23	Total liabilities (add lines 17 through 22)	0.	0.	
	23	Foundations that follow SFAS 117, check here			
	Ì	and complete lines 24 through 26, and lines 30 and 31.			
es	24	Unrestricted		İ	
Š	25			_ _	
3ale		Temporarily restricted Permanently restricted			
힏	20	·			
Net Assets or Fund Balances		•			
<u></u>		and complete lines 27 through 31.		0	
ets	27	Capital stock, trust principal, or current funds	0.	0.	
188	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
¥.	29	Retained earnings, accumulated income, endowment, or other funds	5,325,426.	4,888,281.	
ž	30	Total net assets or fund balances	5,325,426.	4,888,281.	
	١		5 205 406	4 000 001	
	31	Total liabilities and net assets/fund balances	5,325,426.	4,888,281.	
P	art	III Analysis of Changes in Net Assets or Fund Ba	lances		
_	Total	not accept or fund halanges of hasing no of uses. Dotall actions (1) to 0	<u> </u>		
		net assets or fund balances at beginning of year - Part II, column (a), line 3	U		E 20E 406
		t agree with end-of-year figure reported on prior year's return)		1	5,325,426.
		amount from Part I, line 27a		2	<u><437,145.</u> >
		increases not included in line 2 (itemize)		3	0.
		ines 1, 2, and 3		4	4,888,281.
		eases not included in line 2 (itemize)			0.
6	otal	net assets or fund balances at end of year (line 4 minus line 5) - Part II, col	umn (b), line 30		4,888,281. Form 990-PF (2017)
					Form 990-PF (2017)

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Part IV	/ Capital Gains a	and Losses fo	r Tax on Investmer	it Income						
	(a) List and describe t 2-story brick wa	the kind(s) of proper rehouse; or commor	ty sold (for example, real es n stock, 200 shs. MLC Co.)	tate,	(b) H	low ac - Purcl - Dona	quired hase ition	(c) Date (mo., d	acquired ay, yr.)	(d) Date sold (mo., day, yr.)
<u>1a</u>	•									
b 5	SEE ATTACHED	STATEMEN	TS							
C			 							
d					<u> </u>					
е									<u>:</u>	
(e) Gross sales price	(f) Depreciation (or allowa		ost or other basis expense of sale					ain or (loss s (f) minus	
_a										
<u>b</u>										
										
<u>d</u>										
<u>e</u>	928,714.		<u></u>	914,05	55.		· · · · · · · · · · · · · · · · · · ·			14,659.
Comp	lete only for assets showin	g gain in column (h)	and owned by the foundation	on on 12/31/69.					ol. (h) gain	
(:) (TMV as at 10/01/60	(j) Adjusted	l basis (k) i	xcess of col. (I)			col.	(k), but r	not less tha	n -0-) or
(1)	FMV as of 12/31/69	as of 12/3	1/69 ove	er col. (j), if any				LOSSES	(from col. ((11))
				<u> </u>						
										
C										
ď							-			
е										14,659.
		(14	Port Lin	- 7	7					
2 Canital	gain net income or (net ca	nital Inse) If	gain, also enter in Part I, lin (loss), enter -0- in Part I, lin	e /	•	2	l			14,659.
•	•	•		e /	ノ }			-		14,000.
	ort-term capital gain or (los		ions 1222(5) and (6):		١١					
	also enter in Part I, line 8,	column (c).			 				N/A	
Part V), enter -0- in Part I, line 8	nder Section	4940(e) for Reduce	d Tay on Net	inv	octry	ent Inc	omo	N/A	
Was the fo		on 4942 tax on the	distributable amount of any 0(e). Do not complete this pa	•	rıod?					Yes X No
1 Enter t	he appropriate amount in e	ach column for each	year; see the instructions b	efore making any e	ntries					
	(a)		(b)		(c)					(d) oution ratio
Calenda	Base period years ır year (or tax year beginnin	a in) Adjuste	d qualifying distributions	Net value of no	nchar	ıtable-	use assets	1 .	Distrit (col. (b) div	oution ratio vided by col. (c))
	2016	****	493,795		5	. 87	6,740	-	(00 (2) 0	.084025
	2015		130,000		6		8,102			.021424
	2014		131,000				7,530			.021379
	2013		380,705				7,606			.064443
	2012		267,300				9,980			.045849
			201,300			, 02	<u>, , , , , , , , , , , , , , , , , , , </u>	•		.043043
2 Total o	f line 1, column (d)							2		.237120
		-voor baco pariod -	divide the total on line 2 by 5	O or by the numb	or of w	,00r0		-		.23/120
				.o, or by the numb	erory	rears		1.1		047424
the tou	ndation has been in existen	ice ir iess than 5 yeai	rs					3		.047424
								1 1		
4 Enter ti	ne net value of noncharitabl	e-use assets for 201	17 from Part X, line 5					4		<u>5,705,164.</u>
								1 1		
5 Multipl	y line 4 by line 3							5		270,562.
								1 1		
6 Enter 1	% of net investment incom	e (1% of Part I, line	27b)					6		1,392.
								_1		
7 Add lin	es 5 and 6							171		271,954.
8 Enter a	ualifying distributions from	Part XII, line 4						8		530,000.
	-		k in Part VI, line 1b, and com	nlete that nart usin	n a 10	/a tav =	ato			
	Part VI instructions.	mic 7, check the DU/		pioto mat part usin	ya 17	-υ ια λ Ι	u.c.			



Form 990-PF (2017) CAROLI	NE C. LEVINE CHARITABLE	TRUST	1	02-610	1659	, F	Page 4
Part VI Excise Tax Based	on Investment Income (Section 494	10(a), 4940(b).					
	ped in section 4940(d)(2), check here and e						
	(attach copy of letter if ne						
	ection 4940(e) requirements in Part V, check here			1		1,3	92.
of Part I, line 27b	, , , , , , , , , , , , , , , , , , , ,						<u> </u>
	2% of line 27b. Exempt foreign organizations, enter 4	l% of Part I, line 12,	col. (b).				
	tion 4947(a)(1) trusts and taxable foundations only; o			2			0.
3 Add lines 1 and 2	,,,,,,, ,, ,	,		3		1,3	92.
	tion 4947(a)(1) trusts and taxable foundations only;	others, enter -0-)		4		-	0.
	ubtract line 4 from line 3. If zero or less, enter -0-	, , , , , , , , , , , , , , , , , , ,		5		1,3	92.
6 Credits/Payments:			-				<u></u>
a 2017 estimated tax payments and 20	16 overpayment credited to 2017	6a	5,420.	ŀ			
b Exempt foreign organizations - tax wi		6b	0.				
c Tax paid with application for extension		6c	0.				
d Backup withholding erroneously with		6d	0.				
7 Total credits and payments. Add lines				7		5 ,4	20.
	of estimated tax. Check here if Form 2220 is att	tached	ŀ	8		<u> </u>	0.
• • •	or estimated tax. Check here it Form 2220 is att is more than line 7, enter amount owed	เฉบาเงิน		9	-		<u> </u>
-	he total of lines 5 and 8, enter the amount overpaid			10		4,0	28
		4 029	. Refunded	11		4 ,0	0.
Part VII-A Statements Reg		4,020	• Retuilded	!!!!			
1a During the tax year, did the foundatio	n attempt to influence any national, state, or local legi	islation or did it parti	cipate or intervene	in		Yes	
any political campaign?					1a		<u>X</u> _
b Did it spend more than \$100 during t	he year (either directly or indirectly) for political purp	oses? See the instru	ctions for the defini	tion	1b		_X_
If the answer is "Yes" to 1a or 1b, at	ach a detailed description of the activities and copies	of any materials pul	blished or				
distributed by the foundation in conn-							
c Did the foundation file Form 1120-PC	L for this year?				1c		_X
	olitical expenditures (section 4955) imposed during th	ne year:					
(1) On the foundation. ► \$	•		0.				
	by the foundation during the year for political expens						
managers. ► \$	0.	•					
	ctivities that have not previously been reported to the	IRS?			2		Х
If "Yes," attach a detailed description	•						
	s, not previously reported to the IRS, in its governing	instrument, articles	of incorporation, o	r			
	' If "Yes," attach a conformed copy of the changes	,			3		Х_
•	siness gross income of \$1,000 or more during the ye	ear?			4a	_	X
b If "Yes," has it filed a tax return on Fo		.		N/A	4b		
	dissolution, or substantial contraction during the year	r?		,	5		X
If "Yes," attach the statement required		•					
	e) (relating to sections 4941 through 4945) satisfied	either.					
By language in the governing instru		oldior.					
	amends the governing instrument so that no mandato	ory directions that co	onflict with the state	law			
	antends the governing instrument so that no mandate	ory directions that co	milict with the state	1417	6	x	
remain in the governing instrument?	00 in assets at any time during the year? If "Yes," com	anlata Part II. aal. (a)	and Part VV		7	X	
7 Did the foundation have at least \$5,00	out in assets at any time during the year? If ites, con	iipiele Fait II, coi. (c)	, and Fait Av		' -		
	ion reports or with which it is registered. See instruct	ions. ►					
NH	- formale bank and a service of Ferrary 2000 PF 1: 11:-	Attaunas Cananal (-	doggoods)		·		
b If the answer is "Yes" to line 7, has the	a tournation turnished a convent Form UULL-PE to the	AUDITHEY GENERAL (DI	uesignate)				
		Attorney denotal (or			O.L	v	
	Instruction G? If "No," attach explanation		404062515	n do-	8 <u>b</u>	X	
9 Is the foundation claiming status as a	Instruction G? If "No," attach explanation a private operating foundation within the meaning of s	section 4942(j)(3) or	4942(j)(5) for cale	ndar		X	v &
9 Is the foundation claiming status as a year 2017 or the tax year beginning in	Instruction G? If "No," attach explanation	section 4942(j)(3) or implete Part XIV		ndar	9 10	X	X X

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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?

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Part VII-B Statements Regarding Activities for Which I	Form 4720 May Be F	Required (continu	ued)	122	
5a During the year, did the foundation pay or incur any amount to:				Yes	No
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	า 4945(e))?	Ye	s X No		ŀ
(2) Influence the outcome of any specific public election (see section 4955); o	or to carry on, directly or indire		\		
any voter registration drive?			es 🔀 No	1	}
(3) Provide a grant to an individual for travel, study, or other similar purposes		Ye	es X No		
(4) Provide a grant to an organization other than a charitable, etc., organization	n described in section	г -1			
4945(d)(4)(A)? See instructions			s X No	1	1
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or t		(1 27		
the prevention of cruelty to children or animals?			es X No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und		in Regulations	37/3	1	
section 53.4945 or in a current notice regarding disaster assistance? See instr			N/A	5b	
Organizations relying on a current notice regarding disaster assistance, check l				1	ł
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption for			<u> </u>		l
expenditure responsibility for the grant?	1	I/A ∟ Y∈	es L 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	<u> </u>			
a personal benefit contract?	11 6 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Y6	es X No	.	177
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	personal benefit contract?		-	6b	X
If "Yes" to 6b, file Form 8870.	h.h		es X No		
7a At any time during the tax year, was the foundation a party to a prohibited tax s		Y€	_	7b	
Part VIII Information About Officers, Directors, Trust		nagers Highly		70	<u></u>
Paid Employees, and Contractors	ees, i ouridation ivic	inagers, riiging			
1 List all officers, directors, trustees, and foundation managers and t	heir compensation.	·- <u>-</u>			
	(b) Title, and average	(c) Compensation	(d) Contributions to	(e) Exp	pense
(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	account allowa	i, other inces
JOSEPH W. KENNY	TRUSTEE				
20 TRAFALGAR SQUARE, SUITE 505					
NASHUA, NH 03063	0.00	0.	0.		_0.
	TRUSTEE				
155 LAFAYETTE RD, SUITE 4	1			•	
NORTH HAMPTON, NH 03862	0.00	0.	_ 0.		0.
				1	
		1	L		
2 Compensation of five highest-paid employees (other than those inc		enter "NONE."	(d) Contributions to	(a) Evr	2000
(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	(e) Exp	, other
MONE	devoted to position	 	compensation	allowa	ınces
NONE	-				
	1				
					
	1				
		<u> </u>			
	1				
	1				
Total number of other employees paid over \$50,000			>		0
			Form	990-PF	(2017)

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Part VIII Information About Officers, Directors, Trustees, Founda Paid Employees, and Contractors (continued)	tion Managers, Highly	
3 Five highest-paid independent contractors for professional services. 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 statis number of organizations and other beneficiaries served, conferences convened, research papers produced to the content of t	tical information such as the duced, etc.	Expenses
1N/A		
2		
3		
4		
Part IX-B Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during the tax year on	lines 1 and 2.	Amount
1 <u>N/A</u>		
2		-
Allest		
All other program-related investments. See instructions. 3		
		-
		1
Total Add lines 1 through 3		0.

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndations,	see instructions)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
·		1a	5,351,538.
	Average of monthly cash balances	1b	440,507.
	Fair market value of all other assets	1c	
ď		1d	5,792,045.
_	Reduction claimed for blockage or other factors reported on lines 1a and		
·	1c (attach detailed explanation) 1e 0.	1	
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	5,792,045.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	86,881.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,705,164.
6	Minimum investment return Enter 5% of line 5	6	285,258.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations, check here ▶ ☐ and do not complete this part.)	nd certain	
1	Minimum investment return from Part X, line 6	1	285,258.
2a	Tax on investment income for 2017 from Part VI, line 5		
b	Income tax for 2017. (This does not include the tax from Part VI.)		
C	Add lines 2a and 2b	2c	1,392.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	283,866.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	283,866.
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	283,866.
P	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		500 000
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	530,000.
b	Program-related investments - total from Part IX-B	1b	<u> </u>
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:		
	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	530,000.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		
	income. Enter 1% of Part I, line 27b	5	1,392.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	528,608.
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of 4940(e) reduction of tax in those years	qualifies fo	or the section

Part XIII Undistributed Income (see instructions)

Corpus Years prinor to 2016 2016 2017 283,866.2 2017 283,866.2 283,86		(a)	(b)	(c)	(d)
1	,	Corpus	Years prior to 2016	2016	2017
2 Undestinated income, fater, as of the end of 2017	1 Distributable amount for 2017 from Part XI,				
Enter amount for 2016 only 5 Total for prior years: 2 Excess distributions carryover, if any, to 2017: a From 2013 6 From 2013 8 9, 0.70. 6 From 2016 7 From 2017 7 From 2016 7 F	line 7				<u> 283,866.</u>
\$ Total for prior years: \$ 2	2 Undistributed income, if any, as of the end of 2017			_	
3 Excess distributions carryover, if any, to 2017; a From 2012 b From 2013 c From 2014 d From 2015 e From 2016 c From 2016 d From 2016 c From 2016 c From 2016 c From 2016 c From 2016 c From 2016 c From 2016 c Part XII, line 4: ▶ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$				0.	
3 Excess distributions carryover, if any, to 2017: a From 2012 b From 2013	b Total for prior years:				
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From 2016					
d From 2015 e From 2016			j		
e From 2016			ļ		
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Form 990-PF (2017) CAROLIN	E C. LEVINE	CHARITABLE	TRUST	02-610	1659 Page 10
Part XIV Private Operating F			I-A, question 9)	N/A	-
1 a If the foundation has received a ruling of					
foundation, and the ruling is effective fo		-	▶ └┌┈	1	
b Check box to indicate whether the found		ng foundation described		4942(j)(3) or 494	2(1)(5)
2 a Enter the lesser of the adjusted net	Tax year	41,0040	Prior 3 years	1111004	/ / · · · · · · · · · · · · · · · · · ·
income from Part I or the minimum	(a) 2017	(b) 2016	(c) 2015	(d) 2014	(e) Total
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			1		
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		ļ	<u> </u>		
(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,			J		
dividends, rents, payments on					
securities loans (section		Ì			
512(a)(5)), or royalties)					<u></u>
(2) Support from general public		ĺ			
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 Info	rmation (Comple	te this part only	if the foundation	had \$5,000 or mor	e in assets
at any time during t				. ,	
1 Information Regarding Foundation	n Managere:				
a List any managers of the foundation wh	-	than 2% of the total con	tributions received by the	foundation before the close	of any tax
year (but only if they have contributed r			indutions received by the	s louridation before the close	or arry tax
	40,000,1 (2000				
CAROLINE C. LEVINE	400/		/		
b List any managers of the foundation when other entity) of which the foundation has			(or an equally large porti	on of the ownership of a par	mership or
· ·	.s a 10 /6 of greater interes	J.,			
NONE					
2 Information Regarding Contribut	ion, Grant, Gift, Loan,	, Scholarship, etc., P	rograms:		
				not accept unsolicited reques	sts for funds. If
the foundation makes gifts, grants, etc.,	, to individuals or organiza	ations under other condi	tions, complete items 2a,	b, c, and d.	
a The name, address, and telephone num	ber or email address of th	ne person to whom appli	cations should be addres	sed:	
SEE STATEMENT 9					
b The form in which applications should t	pe submitted and informa	tion and materials they s	hould include:		
c Any submission deadlines:					
d Any restrictions or limitations as sweet	e cuch ac hy accarachia	al areas charitable fields	kinds of institutions or	other factors	
d Any restrictions or limitations on award	s, such as by geographic	ai ai eas, chailladhe neids	, kinus vi institutions, Of	omer lacions.	
					000 DE :::-
723601 01-03-18				F	orm 990-PF (2017)

Part XVI-A	Analysis of Income-Producing	Activities

Enter gross amounts unless otherwise indicated.	Unrelate	d business income		y section 512, 513, or 514	(e)
•	(a) Business	(b) Amount	(C) Exclu- sion	(d) Amount	Related or exempt function income
1 Program service revenue:	code		code	Allouit	
a			 		
0	. 1		+		
d			+		
0	1 1				
f			 		
g Fees and contracts from government agencies	- 		 		
2 Membership dues and assessments					
3 Interest on savings and temporary cash					
investments	1				
4 Dividends and interest from securities			14	121,499.	
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			14	3,019.	
8 Gain or (loss) from sales of assets other	ļ		ļ	j	
than inventory			14	98,042.	<u><83,383.</u> :
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:			1		
a					
b					
C					
d					
e				222 560	02 202
12 Subtotal. Add columns (b), (d), and (e)	11	0	•		<83,383.
13 Total Add line 12, columns (b), (d), and (e)				13	139,177.
(See worksheet in line 13 instructions to verify calculation					
Part XVI-B Relationship of Activiti	es to the Acco	mplishment of E	exempt Po	urposes 	
Line No Explain below how each activity for which			A contributed	importantly to the accomp	lishment of
the foundation's exempt purposes (other					
8 SALE OF SECURITIES H	ELD FOR D	<u> ISTRIBUTION</u>	TO QU.	ALIFYING CHA	RITIES
					
					
					
					
	·				
					

	II VAII	Exempt Organ		and transactions at	id Relationships with Noncr	iaritable		
1	Did the o		rectly engage in any of the follow	una with any other organization	n described in section 501(s)		Yes	Ñο
•			nizations) or in section 527, relat	· ·	ii described iii sectioii 30 i(c)	1 1	. 00	
9			lation to a noncharitable exempt	• •				
ű	(1) Cash	, -	ation to a nononamable exempt	organization of.		1a(1)		X
	(2) Othe					1a(1)		X
h	• •	nsactions:				14(2)		
U	-	s of assets to a noncharita	able evernat organization			1 <u>b(1)</u>		<u>x</u>
			ncharitable exempt organization			1b(2)		X
		al of facilities, equipment,				15(3)		X
		nbursement arrangements				1b(4)		X
	, ,	is or Ioan guarantees				1b(5)		X
		-	embership or fundraising solicita	tions		1b(6)		X
С			ailing lists, other assets, or paid e			1c		X
			- · · · · · · · · · · · · · · · · · · ·	· · ·	vays show the fair market value of the good		ets.	
-				• • •	e in any transaction or sharing arrangemen		,	
			other assets, or services receive		,	•		
(a) L	ine no	(b) Amount involved		ble exempt organization	(d) Description of transfers, transactions,	and sharing arr	angeme	nts
			N/A					
					<u> </u>			
			<u> </u>		<u> </u>			
			<u> </u>		<u> </u>			
								
		 			_		_	
			<u> </u>					
			<u> </u>					
2a			ctly affiliated with, or related to, o	ne or more tax-exempt organiz	rations described	г—1		٦
_			on 501(c)(3)) or in section 527?			Yes	LX	No
	if "Yes," c	complete the following sch		(h) Turn of organization	(a) December of relati	onobin		
		(a) Name of org	ganization	(b) Type of organization	(c) Description of relati	Unsup		
		N/A						
—								
_								
_				- 				
	Unde	r penalties of perjury, I declare	that I have examined this return, inclu	ding accompanying schedules and s	statements, and to the best of my knowledge	May the IDC of		
Si	gn and b	pelief, it is true, correct, and coi	mplete Declaration of preparer (other t	han taxpayer) is based on all informa	ation of which preparer has any knowledge	May the IRS d return with the shown below?	prepar	er
He		Jack 111	Teren te	1 5/14/18	TRUSTEE	X Yes	366 111	No
	Sig	nature of officer or trustee		Date /	Title			
		Print/Type preparer's na	ame Pregarer's	s signature 1	Date , Check If PT	IN		
			1 (1)	1.1 /	Self- employed			
Pa		JOSEPH W.	KENNY /	in yang		00033		
	eparer	Firm's name ► HAM	BLETT & KERRIG	AN, P.A.	Firm's EIN ► 02-	03306	72	
Us	e Only			-				
		i .	TRAFALGAR SQ					
		<u> </u>	<u> SHUA, NH 03063</u>		Phone no. (603	3)883-		
						Form 990	-PF	(2017)

Part IV | Capital Gains and Losses for Tax on Investment Income (b) How acquired P - Purchase D - Donation (c) Date acquired (mo., day, yr.) (a) List and describe the kind(s) of property sold, e.g., real estate, (d) Date sold (mo., day, yr) 2-story brick warehouse; or common stock, 200 shs. MLC Co. 1a GS LOCAL EMERGING MARKETS P LOCAL EMERGING MARKETS P b GS GS LOCAL EMERGING MARKETS Ρ P d GS BOND FUND e GS INTERNATIONAL EQUITY P f GS LOCAL EMERGING MARKETS P _g GS STRATEGIC INCOME FD P P h GS STRATEGIC INCOME FD GS SHORT DURATION ₽ SHORT DURATION P GS k STATE STREET INT BRG P STATE STREET INT BRG P m STATE STREET INT BRG P n STATE STREET INT BRG P P o STATE STREET INT BRG (g) Cost or other basis (h) Gain or (loss) (f) Depreciation allowed (e) Gross sales price (or allowable) plus expense of sale (e) plus (f) minus (g) 39. 58 <19.> a 21,372. 31,939. <10,567.> þ 41,992 <13,894.> 28,098. C q 45,000. 44,029. 971. <9,843.> 140,157. 150,000. е 54,029, 80,744 <26,715.> 109,843. 118,016. <u><8,173.</u>> Q 204,307. 190,157. <14,150.> h 45,000. <853.> 45,853. 7,140. <140.> 7,000. 2,837. 0. 2,837. 0. 468. 468. 0. 769. 769. m 1,187. 1,187. 0. n 1,110. 1,110. 0. 0 Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (I) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), (k) Excess of col. (ı) (j) Adjusted basis (i) F.M.V. as of 12/31/69 but not less than "-0-") as of 12/31/69 over col. (j), if any <19.> <10,567.> b <13,89<u>4.</u>> C 971. <9,843.> 9 <26,715.> <8,173.> <14,150.> h <853.> <140.> 0. 0. j 0. m 0. п 0. { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 2 Capital gain net income or (net capital loss) Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8

<u>CAROLINE C. LEVINE CHARITABLE TRUST</u>

_	Одри	(a) List	and desc	ribe the kind(s) of property solarehouse; or common stock, 2	d, e.g., real estate, 00 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
 1a	STATE S	TREET	INT	BRG			P		
-		TREET	INT	BRG			P		
		TREET	INT	BRG			P		
		TREET	INT	BRG			P		
		TREET	INT						
				/IDENDS			 		
g			<u> </u>						
_e h									
_									
_									
k	·								
_n	1								
n)								
0)							_	
	(e) Gross sal	les price		(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		(h) (e) p	Gain or (loss) lus (f) minus (g)	
a		202			202				0.
<u>b</u> _		839			839				0.
С		779			779				0.
<u>d</u>	1	81,786	5.		181,786	•			0.
<u>e</u> _						_			0.
_ <u>f</u> _		98,042	2.						98,042.
g						 			
h			-∔			+			
						+			
ㅗ						+			
<u>k</u>						+			
<u>_</u>									
m n					 	+	 		
0			-					-	
	Complete only for	or assets sho	wing gai	n in column (h) and owned by	the foundation on 12/31/69	+	(I) L ns	ses (from col. (h))	
_			T	(j) Adjusted basis	(k) Excess of col. (I)		Gains (excess o	of col. (h) gain over	col. (k),
	(i) F.M.V. as of	f 12/31/69	1	as of 12/31/69	over col. (j), if any		but n	ot less than "-0-")	
a									0.
b			1	· · · · · · · · · · · · · · · · · · ·			 		0.
c									0.
d									0.
е									0.
f									98,042.
g.				*					
h						_			
									
1									
<u>k</u>						-			
<u>_</u>						+			
m			-	·		+-			
<u>n</u>						-			
0					<u> </u>	+-			
	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	-		14,659.
3	Net short-term ca If gain, also enter If (loss), enter "-0	r in Part I, line	8, colun	defined in sections 1222(5) an nn (c).	d (6):			RT / R	
	11 (1055), 511161 -0	- III Fail I, III	110 0			3		N/A	

FORM 990-PF	DIVIDENDS	AND INTER	EST FROM	I SECUR	ITIES S	STATEMENT	_1
GROSS SOURCE AMOUNT		CAPITAL GAINS DIVIDEND	REV	(A) ENUE BOOKS	(B) NET INVEST- MENT INCOME		
GOLDMAN SACHS GOLDMAN SACHS STATE STREET BANK	216,758. 1,964.		0. 21	L6,758. 1,964.			
& TRUST COMPANY STATE STREET BANK	157.		0.	157.	157.		
& TRUST COMPANY TO PART I, LINE 4	219,541.		$\frac{0.}{0.}$ 21	662. L9,541.	219,541.		
TO TIME 1, DING 4					213,341.	· = ===================================	
FORM 990-PF		OTHER I	NCOME		5	STATEMENT	2
DESCRIPTION			(A) REVENUI PER BOOI		(B) ET INVEST- ENT INCOME	(C) ADJUSTEI NET INCON	
GS NON-DIV DISTRIBU GS UNRECAP 125	TIONS		3 ,	010.	3,010.		
TOTAL TO FORM 990-P	F, PART I,	LINE 11 3,019.		019.	3,019.		
FORM 990-PF		LEGAL FEES			STATEMENT		3
DESCRIPTION		(A) EXPENSES PER BOOKS	(B) NET IN MENT II	/EST-	(C) ADJUSTED NET INCOME	(D) CHARITAI PURPOSI	
HAMBLETT & KERRIGAN	, PA	5,975.	0 .				0.
TO FM 990-PF, PG 1, LN 16A		5,975.	0.				0.

FORM 990-PF	OTHER PROFES	SIONAL FEES	STATEMENT 4		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
CITIZENS BANK GOLDMAN SACHS STATE STREET BANK & TRUST	420. 14,545. 100.	0. 0. 0.		0.0	
TO FORM 990-PF, PG 1, LN 16C	15,065.			0.	
FORM 990-PF	TAX	ES	STATEMENT 5		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME		(D) CHARITABLE PURPOSES	
FOREIGN TAX	1,161.	0.		0 .	
TO FORM 990-PF, PG 1, LN 18	1,161.	0.		0.	
FORM 990-PF	OTHER E	XPENSES	STATEMENT 6		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME		(D) CHARITABLE PURPOSES	
STATE OF NEW HAMPSHIRE MISCELLANEOUS EXPENSE FEDERAL EXPRESS	75. 129. 108.	0. 0. 0.		0.0	
TO FORM 990-PF, PG 1, LN 23	312.	0.	· · · · · · · · · · · · · · · · · · ·	0	

FORM 990-PF U.S. AND STA	TE/CITY GOV	ERNMENT	OBLIGATIONS	STATEMENT	7
DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKE	Т
GS CONCENTRATED GROWTH GS LARGE CAP VALUE CL A	x x		165,000. 165,000.	238,349. 237,453. 475,802.	
TOTAL U.S. GOVERNMENT OBLIGATION	NS	•	330,000.		
TOTAL STATE AND MUNICIPAL GOVER	NMENT OBLIG	ATIONS			
TOTAL TO FORM 990-PF, PART II,	LINE 10A	=	330,000.	475,8	02.
FORM 990-PF	OTHER INVES	TMENTS		STATEMENT	8
DESCRIPTION		ATION HOD	BOOK VALUE	FAIR MARKE	г
ISHARES MSCI ACWI ISHARES TRUST RUSSELL SUMMIT ROCK - PRIVATE EQUITY	COST COST COST		354,935. 267,900.	372,3° 600,7	
OFFSHORE GS BOND FUND TRST I GS HIGH YIELD INST MUT FUND CL :	CC	ST	169,761. 1,035,490.	412,75 1,047,95	92.
S&P ENERGY SELECT GS STRATEGIC INCOME FUND	CC	ST ST ST	250,000. 45,079. 177,677.	234,425. 43,536. 162,461.	
GS RISING DIV GROWTH FUND SPDR S&P BANK GS SHORT DURATION INCOME FUND	CC	ST ST ST	203,513. 24,513. 1,094,835.	219,85 40,63 1,062,63	18.
SOCIETE GENERALE UNITED SOCIETE GENERALE UNITED	CC CC	ST ST	9,000. 9,000.	10,22 10,89	20. 93.
GS INFLATION PROTECTED SECS GS HIGH YIELD FLOATING FUND GS EMERGING MARKETS GS GOG PARTNERS	CO	ST ST ST	302,839. 103,539. 65,685.	305,42 103,23 78,79	19. 95.
OTAL TO FORM 990-PF, PART II, 1		ST -	4,254,170.	4,862,56	

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION PART XV, LINES 2A THROUGH 2D

STATEMENT

9

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

CAROLINE C. LEVINE CHARITABLE TRUST 155 LAFAYETTE ROAD, SUITE 4 NORTH HAMPTON NH

TELEPHONE NUMBER

603-964-3922

FORM AND CONTENT OF APPLICATIONS

COVER LETTER SUMMARIZING REQUEST COPY OF DETERMINATION LETTER BY APPLICANT CURRENT FINANCIAL STATEMENTS ANY OTHER ADDITIONAL INFORMATION DEEMED RELEVAN BY APPLICANT.

ANY SUBMISSION DEADLINES

NONE AT THIS TIME.

RESTRICTIONS AND LIMITATIONS ON AWARDS

NONE AT THIS TIME.