

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	12,281	192,673	192,673
	2 Savings and temporary cash investments	334,312	663,805	664,181
	3 Accounts receivable ▶ <u>22,983</u>			
	Less allowance for doubtful accounts ▶ _____	22,025	22,983	22,983
	4 Pledges receivable ▶ _____			
	Less allowance for doubtful accounts ▶ _____			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ _____			
	Less allowance for doubtful accounts ▶ _____			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	2,116	4,288	4,288
	10a Investments—U S and state government obligations (attach schedule)	512,587	701,700	698,452
	b Investments—corporate stock (attach schedule)	6,845,794	6,649,415	8,185,492
	c Investments—corporate bonds (attach schedule)	1,673,569	1,975,680	1,986,317
	Liabilities	11 Investments—land, buildings, and equipment basis ▶ _____		
Less accumulated depreciation (attach schedule) ▶ _____				
12 Investments—mortgage loans				
13 Investments—other (attach schedule)		529,214	334,378	336,373
14 Land, buildings, and equipment basis ▶ <u>4,270</u>				
Less accumulated depreciation (attach schedule) ▶ <u>2,552</u>		2,571	1,718	1,718
15 Other assets (describe ▶ _____)		1,806,054	1,441,448	1,441,448
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)		11,740,523	11,988,088	13,533,925
17 Accounts payable and accrued expenses		23,613	22,693	
18 Grants payable				
19 Deferred revenue				
20 Loans from officers, directors, trustees, and other disqualified persons				
21 Mortgages and other notes payable (attach schedule)				
22 Other liabilities (describe ▶ _____)		0	27,480	
23 Total liabilities (add lines 17 through 22)		23,613	50,173	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.		
	24 Unrestricted	10,853,203	10,971,294	
	25 Temporarily restricted			
	26 Permanently restricted	863,707	966,621	
	Foundations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg , and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see instructions)	11,716,910	11,937,915	
	31 Total liabilities and net assets/fund balances (see instructions) .	11,740,523	11,988,088	

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	11,716,910
2 Enter amount from Part I, line 27a	2	353,735
3 Other increases not included in line 2 (itemize) ▶	3	102,914
4 Add lines 1, 2, and 3	4	12,173,559
5 Decreases not included in line 2 (itemize) ▶	5	235,644
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	11,937,915

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a PUBLICLY TRADED SECURITIES			
b CAPITAL GAINS DIVIDENDS	P		
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 4,130,645		3,560,966	569,679
b 5,310			5,310
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			569,679
b			5,310
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	574,989
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	45,400

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

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

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

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

☐ Yes ☐ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2016			
2015			
2014			
2013			
2012			

2 Total of line 1, column (d)	2	
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	
5 Multiply line 4 by line 3	5	
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	
7 Add lines 5 and 6	7	
8 Enter qualifying distributions from Part XII, line 4	8	

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here <input checked="" type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter <u>1997-10-22</u> (attach copy of letter if necessary—see instructions)	1	N/A
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		
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)	2	
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		
3	Add lines 1 and 2.	3	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	0
6	Credits/Payments	6a	0
a	2017 estimated tax payments and 2016 overpayment credited to 2017		
b	Exempt foreign organizations—tax withheld at source		
c	Tax paid with application for extension of time to file (Form 8868)		
d	Backup withholding erroneously withheld		
7	Total credits and payments. Add lines 6a through 6d.	7	0
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	0
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed ▶	9	0
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid ▶	10	
11	Enter the amount of line 10 to be Credited to 2018 estimated tax ▶ Refunded ▶	11	

Part VII-A Statements Regarding Activities

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

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11	Yes	
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address WWW.MASONWRIGHTFOUNDATION.ORG	13	Yes	
14	The books are in care of ALAN T POPP Telephone no (413) 733-1517			

Located at **74 WALNUT STREET SPRINGFIELD MA** ZIP+4 **01105**

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year 15		
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? See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). If "Yes," enter the name of the foreign country ▶	16	Yes No

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

1a	During the year did the foundation (either directly or indirectly)		Yes	No
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? <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 checked="" type="checkbox"/> Yes <input 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)? <input type="checkbox"/> 1b			No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2017? <input type="checkbox"/> 1c			No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions). <input type="checkbox"/> 2b			
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 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). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No 3b			
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a			No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017? 4b			No

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

5a During the year did the foundation pay or incur any amount to (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Provide a grant to an individual for travel, study, or other similar purposes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Organizations relying on a current notice regarding disaster assistance check here.  <input type="checkbox"/>	5b		
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? <input type="checkbox"/> Yes <input type="checkbox"/> No <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</i>			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <i>If "Yes" to 6b, file Form 8870</i>	6b		No
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	7b		

Part VIII

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

1

List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
See Additional Data Table				

2

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

(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	Contributions to employee benefit plans and deferred compensation (d)	Expense account, (e) other allowances
JANINE KENT 74 WALNUT STREET SPRINGFIELD, MA 01105	FINANCE DIRECTOR 40 00	98,490	3,445	0
EILEEN DRUMM-MOORE 74 WALNUT STREET SPRINGFIELD, MA 01105	EXECUTIVE DIRECTOR 40 00	96,215	4,547	0
DEBORAH MAXTON 74 WALNUT STREET SPRINGFIELD, MA 01105	AGENCY DIRECTOR 40 00	78,198	7,261	0
LAURA SCHMIEDING 74 WALNUT STREET SPRINGFIELD, MA 01105	ACCOUNTANT 40 00	48,580	17,220	0

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

0

3

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
PEOPLE'S UNITED WEALTH MANAGEMENT ONE MONARCH PLACE-10TH FLOOR SPRINGFIELD, MA 01144	INVESTMENT MANAGEMENT	69,945

Total number of others receiving over \$50,000 for professional services.

0

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 PROVIDING OPERATING MANAGEMENT SERVICES TO AN ASSISTED AND INDEPENDENT LIVING RETIREMENT COMMUNITY, AND TO A HOME CARE AGENCY	434,560
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

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

Total. Add lines 1 through 3

0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	11,199,743
b	Average of monthly cash balances.	1b	39,016
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	11,238,759
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	11,238,759
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	168,581
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	11,070,178
6	Minimum investment return. Enter 5% of line 5.	6	553,509

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

1	Minimum investment return from Part X, line 6.	1	
2a	Tax on investment income for 2017 from Part VI, line 5.	2a	
b	Income tax for 2017 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	
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.	1a	480,271
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	480,271
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions).	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	480,271

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 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.				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2017, enter the date of the ruling. **1997-10-22**

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

	Tax year	Prior 3 years			(e) Total
	(a) 2017	(b) 2016	(c) 2015	(d) 2014	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	268,898	274,981	320,637	531,760	1,396,276
b 85% of line 2a	228,563	233,734	272,541	451,996	1,186,835
c Qualifying distributions from Part XII, line 4 for each year listed	480,271	532,628	443,932	434,291	1,891,122
d Amounts included in line 2c not used directly for active conduct of exempt activities	0	62,575	0	0	62,575
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c	480,271	470,053	443,932	434,291	1,828,547
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					0
(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.	369,006	339,737	341,651	354,507	1,404,901
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)					0
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					0
(3) Largest amount of support from an exempt organization					0
(4) Gross investment income					0

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

1 Information Regarding Foundation Managers:

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

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

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

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

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

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

c Any submission deadlines

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

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> MASON WRIGHT SENIOR LIVING 74 WALNUT STREET SPRINGFIELD, MA 01105		PC	THE ORGANIZATION PROVIDED FUNDING TO A RELATED ASSISTED LIVING FACILITY FOR OPERATIONS	45,711
Total			▶ 3a	45,711
b <i>Approved for future payment</i>				
Total			▶ 3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2017)

Part XVII

		Yes	No
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1a(1)	No
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1a(2)	No
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1b(1)	No
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1b(2)		No
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1b(3)		No
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1b(4)		No
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1b(5)		No
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1b(6)		No
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1c		No
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value
ue

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations

described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule

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

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

(see instr)? ☒ Yes ☐ No

(see instr)? ☒ Yes ☐ No

Print/Type preparer's name CONNIE M LIRA	Preparer's Signature	Date 2018-11-12	Check if self-employed ► <input type="checkbox"/>	PTIN P00481097
Firm's name ► CLIFTONLARSONALLEN LLP				Firm's EIN ► 41-0746749
Firm's address ► 300 CROWN COLONY DRIVE SUITE 310 QUINCY, MA 02169				Phone no (617) 984-8100

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

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
ALAN T POPP MS	PRESIDENT & CEO 50 00	188,593	11,522	0
74 WALNUT STREET SPRINGFIELD, MA 01105				
JOHN MORSE	CHAIR 1 00	0	0	0
74 WALNUT STREET SPRINGFIELD, MA 01105				
PAUL MARCHESE	VICE PRESIDENT 1 00	0	0	0
74 WALNUT STREET SPRINGFIELD, MA 01105				
ALLISON EBNER	SECRETARY 1 00	0	0	0
74 WALNUT STREET SPRINGFIELD, MA 01105				
BETH DESOUSA CPA	TREASURER 1 00	0	0	0
74 WALNUT STREET SPRINGFIELD, MA 01105				
MANUEL ANDRADE	TRUSTEE-LEFT JUNE 2017 1 00	0	0	0
74 WALNUT STREET SPRINGFIELD, MA 01105				
MARY BETH DOWD	TRUSTEE 1 00	0	0	0
74 WALNUT STREET SPRINGFIELD, MA 01105				
SUSAN MCCOY ESQ	TRUSTEE 1 00	0	0	0
74 WALNUT STREET SPRINGFIELD, MA 01105				
ARLENE PUTNAM	TRUSTEE-LEFT JUNE 2017 1 00	0	0	0
74 WALNUT STREET SPRINGFIELD, MA 01105				
SR EILEEN SULLIVAN	TRUSTEE 1 00	0	0	0
74 WALNUT STREET SPRINGFIELD, MA 01105				
JEFF SATTLER	TRUSTEE 1 00	0	0	0
74 WALNUT STREET SPRINGFIELD, MA 01105				
SABRINA WOODGETT	TRUSTEE 1 00	0	0	0
74 WALNUT STREET SPRINGFIELD, MA 01105				

TY 2017 Accounting Fees Schedule**Name:** MASON WRIGHT FOUNDATION INC**EIN:** 04-2105936**Accounting Fees Schedule**

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	44,692	0	0	45,492

TY 2017 General Explanation Attachment**Name:** MASON WRIGHT FOUNDATION INC**EIN:** 04-2105936**General Explanation Attachment**

Identifier	Return Reference	Explanation	
1	SCHEDULE OF CONTROLLED ENTITIES	FORM 990-PF, PART VII-A, LINE 11	NAME OF CONTROLLED ENTITY COLONY CARE SENIOR LIVING, INC EIN 45-4741875ADDRESS 74 WALNUT STREET, SPRINGFIELD, MA 01105EXCESS BUSINESS HOLDING NO NAME OF CONTROLLED ENTITY MASON WRIGHT SENIOR LIVING, INC EIN 47-1890506ADDRESS 74 WALNUT STREET, SPRINGFIELD, MA 01105EXCESS BUSINESS HOLDING NO NAME OF CONTROLLED ENTITY BRIGHT FUTURES EARLY LEARNING CENTER, INC EIN 82-1978704ADDRESS 74 WALNUT STREET, SPRINGFIELD, MA 01105EXCESS BUSINESS HOLDING NO

General Explanation Attachment

Identifier	Return Reference	Explanation	
2	TRANSFERS TO CONTROLLED ENTITIES	FORM 990-PF, PART VII-A, LINE 11	NAME OF CONTROLLED ENTITY BRIGHT FUTURES EARLY LEARNING CENTER, INC EIN 82-1978704ADDRESS 74 WALNUT STREET, SPRINGFIELD, MA 01105DESCRIPTION OF TRANSFER NET ADVANCES, AMOUNT OF TRANSFER \$83,654 NAME OF CONTROLLED ENTITY MASON WRIGHT SENIOR LIVING, INC EIN 47-1890506ADDRESS 74 WALNUT STREET, SPRINGFIELD, MA 01105DESCRIPTION OF TRANSFER FORGIVENESS OF DEBT, AMOUNT OF TRANSFER \$235,642 TOTAL TRANSFERS TO CONTROLLED ENTITIES \$319,296 NET ADVANCES TOTAL TRANSFER \$83,654 FORGIVENESS OF DEBT TOTAL TRANSFER \$235,642

General Explanation Attachment

Identifier	Return Reference	Explanation	
3	TRANSFERS FROM CONTROLLED ENTITIES	FORM 990-PF, PART VII-A, LINE 11	NAME OF CONTROLLED ENTITY COLONY CARE SENIOR LIVING, INC EIN 45-4741875ADDRESS 74 WALNUT STREET, SPRINGFIELD, MA 01105DESCRIPTION OF TRANSFER NET ADVANCES, AMOUNT OF TRANSFER \$315,532 DESCRIPTION OF TRANSFER ADMINISTRATIVE FEE, AMOUNT OF TRANSFER \$164,497 NAME OF CONTROLLED ENTITY MASON WRIGHT SENIOR LIVING, INC EIN 47-1890506ADDRESS 74 WALNUT STREET, SPRINGFIELD, MA 01105DESCRIPTION OF TRANSFER NET ADVANCES, AMOUNT OF TRANSFER \$27,480 DESCRIPTION OF TRANSFER ADMINISTRATIVE FEE, AMOUNT OF TRANSFER \$229,965 DESCRIPTION OF TRANSFER GRANT, AMOUNT OF TRANSFER \$45,711 TOTAL TRANSFERS FROM CONTROLLED ENTITIES \$783,185 NET ADVANCES TOTAL TRANSFER \$343,012 ADMINISTRATIVE FEE TOTAL TRANSFER \$394,462 GRANT TOTAL TRANSFER \$45,711

TY 2017 Investments Corporate Bonds Schedule

Name: MASON WRIGHT FOUNDATION INC

EIN: 04-2105936

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
CALLABLE BOND"	74,571	77,106
CALLABLE BOND"	75,498	76,022
CALLABLE BOND"	71,497	72,288
CALLABLE BOND"	71,845	75,307
CALLABLE BOND"	72,342	73,736
8/01/2025"	76,427	79,112
BP CAPITAL MARKETS 3.814% 2/10/2024"	75,866	78,845
CALLABLE BOND"	76,289	77,923
CITIGROUP INC 3.750% 6/16/2024"	51,089	51,860
CALLABLE"	50,460	51,010
2.750% 3/10/2022"	74,777	75,215
CALLABLE BOND"	30,000	29,952
CALLABLE BOND"	74,524	76,187
CALLABLE BOND"	49,079	50,276
MORGAN STANLEY 4.000% 7/23/2025"	77,375	78,529
1/10/2020 FLOATING RATE"	100,000	100,552
UNITEDHEALTH GROUP 2.875% 12/15/2021"	61,237	60,764
DODGE & COX INCOME #147"	28,777	28,625
FIDELITY FLOATING RATE HIGH INC #814"	158,732	155,933
JP MORGAN CORE BOND SELECT #3720"	64,291	64,084

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
PIMCO HIGH YIELD INSTL #108"	316,281	313,091
#56"	54,569	54,418
PIMCO TOTAL RETURN INSTL #35"	38,213	36,979
VANGUARD GNMA ADMIRAL #536"	151,941	148,503

TY 2017 Investments Corporate Stock Schedule

Name: MASON WRIGHT FOUNDATION INC
EIN: 04-2105936

Name of Stock	End of Year Book Value	End of Year Fair Market Value
GERSTEIN FISHER MULTI-FACTOR INTL GR"	446,603	446,883
#799"	483,714	607,969
#436"	112,932	112,039
WISDOMTREE EUROPE HEDGED EQ FUND ETF"	227,473	229,804
ARCELORMITTAL SA ADR"	6,064	7,270
BHP BILLITON PLC ADR"	15,928	20,110
CAVCO INDUSTRIES INC"	7,695	12,666
ECOLAB INC"	46,809	52,867
MONSANTO CO"	15,810	15,765
PPG INDUSTRIES INC"	28,058	33,761
PRAXAIR INC"	25,763	25,677
QUAKER CHEMICAL CORP"	10,822	21,111
ROYAL DSM NV ADR"	4,900	6,936
RPM INTERNATIONAL INC"	38,385	43,666
TORAY INDS UNSPONSORED ADR"	17,641	17,261
3M CO"	58,362	83,792
ACS ACTIVIDADES CONS - UNS ADR"	13,368	13,514
AERCAP HOLDINGS NV"	15,579	19,624
AIRBUS SE ADR"	5,382	8,198
B A E SYSTEMS PLC ADR"	15,792	16,464
BOEING CO"	58,836	131,530
CATERPILLAR INC"	1,779	2,679
COSTAR GROUP INC"	21,388	36,822
CUMMINS INC"	39,104	50,515
EAGLE MATERIALS INC"	11,087	12,236
FORTIVE CORP"	34,630	42,614
GARDNER DENVER HOLDINGS INC"	28,362	31,046
GENERAL ELECTRIC"	7,294	4,118
GRACO INC"	10,975	13,566
GRAINGER W W INC"	12,959	18,664

Name of Stock	End of Year Book Value	End of Year Fair Market Value
HONEYWELL INTL INC"	66,207	103,058
KOMATSU LTD"	7,331	11,440
LINCOLN ELECTRIC HLDGS INC"	14,923	16,301
LOCKHEED MARTIN CORPORATION"	3,767	4,495
MIDDLEBY CORP"	10,036	13,090
NORDSON CORP"	15,625	28,987
RBC BEARINGS INC"	16,469	33,370
RITCHIE BROS AUCTIONEERS"	18,615	22,328
ROCKWELL COLLINS INC"	5,526	5,967
SCHNEIDER NATIONAL INC CL B"	20,517	22,677
TE CONNECTIVITY LTD"	3,493	4,277
TORO CO"	17,832	27,397
UNITED PARCEL SVC INC CL B"	25,847	27,643
WABTEC CORP"	30,222	30,211
WASTE MANAGEMENT INC NEW "	21,341	34,347
AMAZON COM INC"	44,287	50,287
APTARGROUP INC"	12,508	16,134
BURLINGTON STORES INC"	16,457	37,032
CARREFOUR SA-SP ADR"	15,597	13,912
CARTER'S INC"	41,846	44,646
CINEMARK HOLDINGS INC"	6,557	6,860
COMCAST CORP NEW CL A"	27,873	28,516
DISNEY (WALT) COMPANY HOLDING CO"	60,323	63,108
DORMAN PRODUCTS INC"	17,447	21,277
FIVE BELOW INC"	12,087	24,008
HOME DEPOT INC"	65,868	105,379
HORIZON GLOBAL CORP"	8,166	8,047
ISHARES U.S. HOME CONSTRUCTION ETF"	48,678	84,511
LITHIA MOTORS INC CLASS A"	19,511	23,059
MCDONALDS CORP"	41,609	72,118

Name of Stock	End of Year Book Value	End of Year Fair Market Value
MICHAELS COMPANIES INC"	14,252	15,651
PANASONIC CORP- SPON ADR"	7,478	10,631
POLARIS INDS INC"	14,600	17,855
POOL CORP"	13,075	15,817
PRICELINE GROUP INC"	51,905	69,510
STARBUCKS CORP"	38,780	39,569
T J X COS INC"	17,327	22,938
TATA MTRS LTD ADR"	10,642	9,855
TUPPERWARE CORP"	15,029	11,976
TWENTY FIRST CENTURY FOX INC CL A"	1,060	1,139
ALTRIA GROUP INC"	17,460	21,423
AMBEV SA ADR"	9,987	12,881
ANHEUSER BUSCH INBEV SA/NV"	1,051	1,004
BJS RESTAURANTS INC"	19,627	17,399
BRITISH AMERICAN TOBACCO PLC SPN ADR"	23,542	22,643
CARLSBERG A/S -B- SPON ADR"	1,783	2,307
CHIPOTLE MEXICAN GRILL INC"	6,900	6,070
COCA COLA CO"	12,997	13,030
CONSTELLATION BRANDS"	31,305	46,400
COSTCO WHSL CORP NEW"	26,725	40,946
GENERAL MILLS INC"	17,401	20,989
KIMBERLY CLARK CORP"	18,677	17,737
MCCORMICK & CO INC NON VOTING"	21,814	23,337
PEPSICO INC"	65,070	70,153
PRICESMART INC"	26,634	26,519
PROCTER & GAMBLE CO"	77,314	88,940
SEVEN & I HLDGS CO LTD ADR"	12,177	12,347
YUM CHINA HOLDINGS INC"	12,838	13,767
CALLON PETROLEUM CO"	20,101	18,942
CANADIAN NAT RES LTD"	9,497	10,645

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CHEVRON CORP"	62,916	73,612
DRIL-QUIP INC"	8,005	5,581
EOG RESOURCES INC"	40,969	48,344
MATADOR RESOURCES CO"	18,792	21,013
OGE ENERGY CORP"	16,081	15,698
PIONEER NAT RES CO"	29,287	30,940
ROYAL DUTCH SHELL PLC SPON ADR B"	15,324	19,258
SPONSORED ADR A"	6,434	9,206
SCHLUMBERGER LIMITED"	98,073	83,361
SUPERIOR ENERGY SVCS INC"	17,933	5,239
TOTAL S A ADR"	20,867	25,152
A X A ADR"	6,494	7,633
AIA GROUP LTD ADR"	5,778	6,855
AMERICAN CAMPUS CMNTYS INC REIT"	30,958	32,701
AMERICAN EXPRESS CO"	9,344	9,832
ARTISAN PARTNERS ASSET MGMT INC"	16,860	14,023
B B & T CORP"	24,626	28,291
SPONSORED ADR"	6,850	7,047
BANK OF AMERICA CORP"	43,166	45,107
BANKUNITED INC"	17,226	19,423
BERKSHIRE HATHAWAY INC DEL CL B"	34,218	45,987
BLACKROCK INC"	65,659	94,009
CHUBB LTD"	58,544	69,996
CORESITE REALTY CORP REIT"	18,090	18,224
DBS GROUP HLDGS ADR"	4,821	7,438
DEUTSCHE BOERSE ADR"	25,122	26,049
DNB ASA-SPONSOR ADR"	14,091	14,226
EASTERLY GOVERNMENT PPTYS INC"	41,884	42,061
COM"	2,688	3,037
GLACIER BANCORP INC"	18,568	23,673

Name of Stock	End of Year Book Value	End of Year Fair Market Value
HSBC HLDGS PLC ADR NEW "	9,707	14,717
INTESA SANPAOLO ADR"	8,833	10,897
JAMES RIVER GROUP HOLDINGS LTD"	33,591	32,488
JPMORGAN CHASE & CO"	79,266	133,675
ADR"	1,981	2,471
KEYCORP NEW "	40,768	62,103
LLOYDS BANKING GROUP PLC ADR"	15,071	15,458
MARKETAXESS HLDGS INC"	15,549	47,815
METLIFE INC"	43,883	49,397
MID-AMER APT CMNTYS INC REIT"	19,890	26,950
ADR"	15,345	13,380
OTSUKA HLDGS CO LTD ADR"	14,022	20,491
PHYSICIAN REIT"	22,518	21,858
PINNACLE FINANCIAL PARTNERS INC"	30,267	29,106
PROASSURANCE CORP"	21,348	27,089
SCHWAB CHARLES CORP"	8,283	10,325
SIGNATURE BK NEW YORK N Y"	29,348	31,158
SPONSORED ADR"	15,977	18,292
SUMMIT HOTEL PROPERTIES INC REIT"	5,106	4,935
SUN CMNTYS INC REIT"	17,926	24,401
SVB FINANCIAL GROUP"	23,721	48,157
TEXAS CAPITAL BANCSHARES INC"	13,067	22,581
COM"	16,144	24,598
WELLS FARGO & CO NEW"	17,745	21,356
WESTERN ALLIANCE BANCORP"	1,124	1,076
ABBOTT LABS"	39,715	50,393
ACADIA HEALTHCARE COMPANY INC"	24,127	15,173
ALEXION PHARMACEUTICALS INC"	11,047	10,046
ALKERMES PLC"	19,304	17,185
ALLERGAN PLC"	28,099	23,392

Name of Stock	End of Year Book Value	End of Year Fair Market Value
AMGEN INC"	49,637	51,996
BAYER AG SPONSORED ADR"	6,779	6,588
BIOGEN INC"	15,898	17,840
C V S HEALTH CORP"	46,210	38,280
CATALENT INC"	17,481	21,115
CELGENE CORP"	43,358	42,161
DANAHER CORP"	54,344	63,025
DENTSPLY SIRONA INC"	8,523	10,072
ESSILOR INTERNATIONAL SA-UNSPON ADR"	22,345	23,672
ICU MED INC"	10,073	32,616
IDEXX LABS INC"	6,609	14,074
IMPAX LABORATORIES INC"	9,647	10,073
JOHNSON & JOHNSON INC"	59,293	78,523
K2M GROUP HOLDINGS INC"	7,601	7,020
LILLY ELI & CO"	4,705	5,574
MEDTRONIC PLC"	63,307	68,557
MERCK & CO INC NEW "	12,932	13,730
NOVARTIS ADR"	72,415	67,336
PFIZER INC"	21,438	23,688
PREMIER INC CLASS A"	27,218	25,687
REGENERON PHARMACEUTICALS"	6,187	5,263
ROCHE HLDG LTD SPON ADR"	19,665	18,750
SMITH & NEPHEW P L C SPON ADR NEW "	13,888	14,109
STERIS PLC"	20,344	30,789
THERMO FISHER SCIENTIFIC INC"	43,469	61,141
UNITEDHEALTH GROUP INC"	39,607	72,531
WEST PHARMACEUTICAL SVSC INC"	16,551	34,535
ZOETIS INC"	15,535	18,514
EQUINOX INC REIT"	10,074	9,971
PUBLIC STORAGE INC REIT"	16,454	13,794

Name of Stock	End of Year Book Value	End of Year Fair Market Value
VENTAS INC REIT"	19,970	18,843
AMERICAN ELECTRIC POWER INC"	17,354	21,997
AMERICAN WTR WKS CO INC NEW"	10,393	15,919
E.ON SE ADR"	1,680	1,958
ENGIE SPONS ADR"	9,599	12,910
NEXTERA ENERGY INC"	47,703	62,007
PORTLAND GEN ELEC CO"	19,662	20,830
QEP RES INC"	24,749	8,603
A T & T INC"	18,862	21,073
KONINKLIJKE KPN NV ADR"	20,972	20,627
ORANGE ADR"	13,536	15,155
VERIZON COMMUNICATIONS"	33,732	37,739
ACCENTURE PLC IRELAND CLASS A"	17,834	26,176
ADECCO GROUP SA ADR"	7,792	10,634
ADOBE SYS INC"	3,230	3,855
AKAMAI TECHNOLOGIES INC"	13,198	18,341
ALIGN TECHNOLOGY INC"	1,937	6,666
ALPHABET INC CL A"	44,572	64,257
ALPHABET INC CL C"	47,803	78,480
ANALOG DEVICES INC"	9,519	11,129
ANSYS INC"	13,962	25,976
APPLE INC"	99,007	159,245
BAIDU INC ADR"	16,702	17,332
BLACKBAUD INC"	12,180	29,197
BOOZ ALLEN HAMILTON HOLDINGS"	25,767	27,492
CISCO SYSTEMS INC"	48,232	66,297
CK HUTCHISON HLDGS LTD ADR"	10,363	11,413
COGNEX CORP"	11,195	31,436
EBAY INC COM"	7,261	7,888
EXPONENT INC"	16,533	30,004

Name of Stock	End of Year Book Value	End of Year Fair Market Value
FACEBOOK INC A"	60,024	68,114
FISERV INC"	35,519	38,814
GARTNER GROUP INC"	28,072	43,595
INTEL CORP"	54,916	75,979
INTERNATIONAL BUSINESS MACHINES"	50,491	48,327
LOGMEIN INC"	28,831	28,167
MICROSOFT CORP"	84,135	157,051
MURATA MANUFACTURING CO ADR"	12,411	12,415
ORACLE CORPORATION"	49,153	60,424
PALO ALTO NETWORKS INC"	10,347	11,595
PAYCHEX INC"	15,234	19,267
PAYPAL HOLDINGS INC"	11,079	13,914
POWER INTEGRATIONS INC"	12,959	17,799
RED HAT INC"	9,976	12,370
SECOM LTD ADR"	16,872	20,767
SILICON LABORATORIES INC"	16,253	19,161
SPLUNK INC"	753	1,077
SS&C TECHNOLOGIES HLDGS INC"	14,759	22,993
TEXAS INSTRUMENTS"	3,593	4,595
TYLER TECHNOLOGIES INC"	20,840	38,066
ULTIMATE SOFTWARE GROUP INC"	19,054	24,224
VISA INC CLASS A SHARES"	52,909	79,700
VMWARE INC"	6,100	8,271
WAGeworks INC"	21,431	26,784
ZEBRA TECHNOLOGIES CORP CL A"	27,271	37,472

TY 2017 Investments Government Obligations Schedule**Name:** MASON WRIGHT FOUNDATION INC**EIN:** 04-2105936**US Government Securities - End
of Year Book Value:**

701,700

**US Government Securities - End
of Year Fair Market Value:**

698,452

**State & Local Government
Securities - End of Year Book
Value:**

0

**State & Local Government
Securities - End of Year Fair
Market Value:**

0

TY 2017 Investments - Other Schedule**Name:** MASON WRIGHT FOUNDATION INC**EIN:** 04-2105936**Investments Other Schedule 2**

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
CALLABLE BOND"	AT COST	78,011	76,345
6/03/2026"	AT COST	75,767	78,647
WELLS FARGO 3.000% 10/23/2026"	AT COST	24,942	24,504
GERSTEIN FISHER MLT-FTR GL RL EST SE"	AT COST	155,658	156,877

**TY 2017 Land, Etc.
Schedule****Name:** MASON WRIGHT FOUNDATION INC**EIN:** 04-2105936

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
EQUIPMENT	4,270	2,552	1,718	1,718

TY 2017 Legal Fees Schedule**Name:** MASON WRIGHT FOUNDATION INC**EIN:** 04-2105936

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL	23,749	0	0	23,842

TY 2017 Other Assets Schedule**Name:** MASON WRIGHT FOUNDATION INC**EIN:** 04-2105936**Other Assets Schedule**

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
DUE FROM RELATED PARTY - DEMAND NOTE	675,162	390,885	390,885
DUE FROM RELATED PARTY - DEVELOPMENT FEE	190,642		
DUE FROM RELATED PARTIES - OTHER ADVANCES	76,543	83,942	83,942
BENEFICIAL INTEREST IN THIRD PARTY TRUSTS	863,707	966,621	966,621

TY 2017 Other Decreases Schedule**Name:** MASON WRIGHT FOUNDATION INC**EIN:** 04-2105936

Description	Amount
FORGIVENESS OF DEBT	235,642
ROUNDING	2

TY 2017 Other Expenses Schedule**Name:** MASON WRIGHT FOUNDATION INC**EIN:** 04-2105936**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OFFICE SUPPLIES	36,437	0	0	38,515
MISCELLANEOUS EXPENSES	6,373	0	0	36,159
ADVERTISING, MARKETING & BRANDING	11,197	0	0	11,197
INSURANCE	2,775	0	0	2,869
REPAIRS & MAINTENANCE	18,019	0	0	18,019
MISCELLANEOUS - BANK FEES	102	102	102	0

TY 2017 Other Income Schedule**Name:** MASON WRIGHT FOUNDATION INC**EIN:** 04-2105936**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
MANAGEMENT FEES	394,462		394,462
OTHER INCOME	3,000		3,000

TY 2017 Other Increases Schedule

Name: MASON WRIGHT FOUNDATION INC
EIN: 04-2105936

Description	Amount
CHANGE IN BENEFICIAL INTERESTS IN THIRD PARTY TRUSTS	102,914

TY 2017 Other Liabilities Schedule**Name:** MASON WRIGHT FOUNDATION INC**EIN:** 04-2105936

Description	Beginning of Year - Book Value	End of Year - Book Value
DUE TO RELATED PARTY - OTHER ADVANCES	0	27,480

TY 2017 Other Professional Fees Schedule**Name:** MASON WRIGHT FOUNDATION INC**EIN:** 04-2105936

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT FEES	69,945	69,945	69,945	0
CONSULTANTS	7,560	0	0	10,024

TY 2017 Taxes Schedule**Name:** MASON WRIGHT FOUNDATION INC**EIN:** 04-2105936

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
REAL ESTATE TAXES	1,417	0	0	1,417
FOREIGN TAXES PAID	4,636	4,636	4,636	0
PAYROLL TAXES	35,993	0	0	35,993