

For calendar year 2017, or tax year beginning 01-01-2017, and ending 12-31-2017

Name of foundation THE LYNCH FOUNDATION		A Employer identification number 04-3017940	
Number and street (or P O box number if mail is not delivered to street address) 109 STATE STREET NO 402		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code BOSTON, MA 02109		B Telephone number (see instructions) (617) 639-1280	
G Check all that apply <div><input type="checkbox"/> Initial return</div> <div><input type="checkbox"/> Initial return of a former public charity</div> <div><input type="checkbox"/> Final return</div> <div><input type="checkbox"/> Amended return</div> <div><input type="checkbox"/> Address change</div> <div><input type="checkbox"/> Name change</div>		D 1. Foreign organizations, check here 2 Foreign organizations meeting the 85% test, check here and attach computation	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 134,153,703		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here	
J Accounting method <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) (Part I, column (d) must be on cash basis)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	0			
	2 Check <input checked="" type="checkbox"/> If the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	495,655	495,655		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	20,839,633			
	b Gross sales price for all assets on line 6a	217,708,128			
	7 Capital gain net income (from Part IV, line 2)		20,839,633		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	21,335,288	21,335,288		
	13 Compensation of officers, directors, trustees, etc	408,858	0		408,858
	14 Other employee salaries and wages	261,560	110,000		151,560
	15 Pension plans, employee benefits	84,253	12,924		69,965
	16a Legal fees (attach schedule)	900	0		900
	b Accounting fees (attach schedule)	55,764	0		66,035
	c Other professional fees (attach schedule)	646,015	614,185		29,708
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	616,542	11,158		28,824
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy	49,285	0		44,035
	21 Travel, conferences, and meetings	63,952	1,925		61,936
	22 Printing and publications				
	23 Other expenses (attach schedule)	124,768	0		129,569
	24 Total operating and administrative expenses. Add lines 13 through 23	2,311,897	750,192		991,390
	25 Contributions, gifts, grants paid	8,051,787			8,051,787
	26 Total expenses and disbursements. Add lines 24 and 25	10,363,684	750,192		9,043,177
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	10,971,604			
	b Net investment income (if negative, enter -0-)		20,585,096		
c Adjusted net income(if negative, enter -0-)					

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing			
	2 Savings and temporary cash investments	3,787,577	18,448,919	18,448,919
	3 Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4 Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	130,397	11,221	11,221
	10a Investments—U S and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)	105,313,522	110,039,213	110,039,213
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	5,408,605	5,654,350	5,654,350
	14 Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	114,640,101	134,153,703	134,153,703	
Liabilities	17 Accounts payable and accrued expenses	38,405	172,623	
	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 ▶ _____)	267,394	432,253	
	23 Total liabilities (add lines 17 through 22)	305,799	604,876	
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	114,334,302	133,548,827	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg , and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see instructions)	114,334,302	133,548,827	
31 Total liabilities and net assets/fund balances (see instructions) .	114,640,101	134,153,703		

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	114,334,302
2 Enter amount from Part I, line 27a	2	10,971,604
3 Other increases not included in line 2 (itemize) ▶ _____	3	8,242,921
4 Add lines 1, 2, and 3	4	133,548,827
5 Decreases not included in line 2 (itemize) ▶ _____	5	0
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	133,548,827

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			
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 217,708,128		196,868,495	20,839,633
b			
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			20,839,633
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	<div style="display: flex; align-items: center;"> <div style="font-size: 3em; margin-right: 5px;">{</div> <div> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div> <div style="font-size: 3em; margin-left: 5px;">}</div> </div>	2	20,839,633
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	<div style="display: flex; align-items: center;"> <div style="font-size: 3em; margin-right: 5px;">{</div> <div></div> <div style="font-size: 3em; margin-left: 5px;">}</div> </div>	3	

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

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

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

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



Yes



No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2016	8,712,890	107,238,745	0 081248
2015	8,769,001	114,291,299	0 076725
2014	9,651,184	122,043,958	0 079080
2013	10,123,126	110,626,758	0 091507
2012	8,233,196	91,734,744	0 089750

2 Total of line 1, column (d)	2	0 418310
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 083662
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	122,271,273
5 Multiply line 4 by line 3	5	10,229,459
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	205,851
7 Add lines 5 and 6	7	10,435,310
8 Enter qualifying distributions from Part XII, line 4	8	9,043,177

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
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	411,702
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	411,702
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	411,702
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	266,152
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	266,152
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	145,550
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 ▶ \$ _____ (2) On foundation managers ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	2	No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>	5	No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	No
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ MA _____		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i> .	8b	Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the taxable year beginning in 2017 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	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		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address THELYNCHFOUNDATION.COM	13	Yes	
14	The books are in care of KATHRYN EVERETT EXECUTIVE DIRECTOR Telephone no (617) 639-1280			

Located at **109 STATE STREET SUITE 402 BOSTON MA** ZIP+4 **02109**

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 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)? <input type="checkbox"/> 1b			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 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)?		5b		
	Organizations relying on a current notice regarding disaster assistance check here.	<input type="checkbox"/>			
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?		6b	No	
	<i>If "Yes" to 6b, file Form 8870</i>				
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?		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
DAVID BADEAU 109 STATE STREET SUITE 402 BOSTON, MA 02109	RESEARCH ANALYST 20 00	110,000	12,924	0
VICTORIA PRUDDEN 109 STATE STREET SUITE 402 BOSTON, MA 02109	OPERATIONS MANAGER 40 00	85,000	15,250	0
ASHLEY MANN 109 STATE STREET SUITE 402 BOSTON, MA 02109	SPECIAL PROJECTS MAN 40 00	66,560	9,652	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
NONE		

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

0

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

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

Total. Add lines 1 through 3 ▶

0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	108,435,237
b	Average of monthly cash balances.	1b	15,686,814
c	Fair market value of all other assets (see instructions).	1c	11,221
d	Total (add lines 1a, b, and c).	1d	124,133,272
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	124,133,272
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	1,861,999
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	122,271,273
6	Minimum investment return. Enter 5% of line 5.	6	6,113,564

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	6,113,564
2a	Tax on investment income for 2017 from Part VI, line 5.	2a	411,702
b	Income tax for 2017 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	411,702
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	5,701,862
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	5,701,862
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	5,701,862

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	9,043,177
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	9,043,177
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	9,043,177

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				5,701,862
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2017				
a From 2012.	3,868,430			
b From 2013.	5,208,895			
c From 2014.	3,816,869			
d From 2015.	3,106,751			
e From 2016.	3,351,476			
f Total of lines 3a through e.	19,352,421			
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ <u>9,043,177</u>				
a Applied to 2016, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2017 distributable amount.				5,701,862
e Remaining amount distributed out of corpus	3,341,315			
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a))	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	22,693,736			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2016 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2017 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2018				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions).	3,868,430			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	18,825,306			
10 Analysis of line 9				
a Excess from 2013.	5,208,895			
b Excess from 2014.	3,816,869			
c Excess from 2015.	3,106,751			
d Excess from 2016.	3,351,476			
e Excess from 2017.	3,341,315			

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.

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					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c "Support" alternative test—enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

PETER S LYNCH

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 e-mail address of the person to whom applications should be addressed

KATHRYN M EVERETT
109 STATE STREET SUITE 402
BOSTON, MA 02109
(617) 639-1280

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

ALL REQUESTS ARE SUBMITTED ELECTRONICALLY THROUGH THE LYNCH FOUNDATION WEBSITE WWW.THELYNCHFOUNDATION.COM
APPLICANTS SHOULD FILL OUT THE CONCEPT PAPER WHICH INCLUDES INFORMATION ABOUT THE ORGANIZATION, DESCRIPTION OF REQUEST AND OBJECTIVES OF THEIR REQUEST

c Any submission deadlines

THE CONCEPT PAPERS ARE REVIEWED ON A ROLLING PROCESS

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

ORGANIZATIONS MUST BE A 501(C)(3) ORGANIZATION THAT PERFORMS WORK PRIMARILY IN MASSACHUSETTS AND BE UNDER THE GIVING GUIDELINES OF EDUCATION, CULTURE AND HISTORIC PRESERVATION, HEALTH CARE AND WELLNESS, AND RELIGIOUS AND EDUCATIONAL EFFORTS OF THE ROMAN CATHOLIC CHURCH

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> See Additional Data Table				
Total			3a	8,051,787
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

[illegible]

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

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.	1a(1)		No
(2) Other assets.	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
(3) Rental of facilities, equipment, or other assets.	1b(3)		No
(4) Reimbursement arrangements.	1b(4)		No
(5) Loans or loan guarantees.	1b(5)		No
(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.			

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

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule

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

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.		
	*****	2018-04-23	*****
	Signature of officer or trustee	Date	Title

May the IRS discuss this return with the preparer shown below (see instr)? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
--

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed <input type="checkbox"/>	PTIN
	DAVID KELLEHER CPA		2018-04-23		P01059560
	Firm's name ▶ ALEXANDER ARONSON FINNING & CO PC				Firm's EIN ▶ 04-2571780
Firm's address ▶ 50 WASHINGTON STREET WESTBOROUGH, MA 01581					Phone no (508) 366-9100

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
PETER S LYNCH	PRESIDENT AND CHAIRMAN 1 00	0	0	0
109 STATE STREET SUITE 402 BOSTON, MA 02109				
RICHARD SPILLANE	TREASURER 1 00	0	0	0
109 STATE STREET SUITE 402 BOSTON, MA 02109				
ELIZABETH DE MONTRICHARD	SECRETARY 1 00	0	0	0
109 STATE STREET SUITE 402 BOSTON, MA 02109				
J FREDERICK BUSH	TRUSTEE (THROUGH OCT 2017) 1 00	0	0	0
109 STATE STREET SUITE 402 BOSTON, MA 02109				
NANCY R COOLIDGE	TRUSTEE 1 00	0	0	0
109 STATE STREET SUITE 402 BOSTON, MA 02109				
RALPH C SWEETLAND MD	TRUSTEE 1 00	0	0	0
109 STATE STREET SUITE 402 BOSTON, MA 02109				
ANNIE LUKOWSKI	TRUSTEE 1 00	0	0	0
109 STATE STREET SUITE 402 BOSTON, MA 02109				
MARY WITKOWSKI	TRUSTEE 1 00	0	0	0
109 STATE STREET SUITE 402 BOSTON, MA 02109				
JACK REGAN	TRUSTEE 1 00	0	0	0
109 STATE STREET SUITE 402 BOSTON, MA 02109				
KATHRYN M EVERETT	EXECUTIVE DIRECTOR 40 00	408,858	45,527	0
109 STATE STREET SUITE 402 BOSTON, MA 02109				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
1647 INC 1452 DORCHESTER AVENUE 4TH FLOOR DORCHESTER, MA 02122		NC	PROGRAM EXPANSION	100,000
AMERICAN IRELAND FUND 10 POST OFFICE SQUARE BOSTON, MA 02109		NC	GENERAL OPERATING SUPPORT	25,000
ARCHDIOCESE OF BOSTON 66 BROOKS DRIVE BRAINTREE, MA 02184		NC	HS ENROLLMENT CAMPAIGN	353,534
ASSOCIATED GRANTMAKERS 133 FEDERAL STREET SUITE 802 BOSTON, MA 02110		NC	MEMBERSHIP	5,000
ASSOCIATED GRANTMAKERS-BEF 133 FEDERAL STREET SUITE 802 BOSTON, MA 02110		NC	MEMBERSHIP-BOSTON EDUCATION FUNDERS	500
Total ▶ 3a				8,051,787

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BOSTON DEBATE LEAGUE 566 COLUMBUS AVENUE BOSTON, MA 02118		NC	PROGRAM EXPANSION	100,000
BOSTON HARBOR NOW 15 STATE STREET 1100 BOSTON, MA 02109		NC	PROGRAM EXPANSION	50,000
BOSTON PUBLIC SCHOOLS 2300 WASHINGTON STREET ROXBURY, MA 02119		NC	PLANNING GRANT	13,141
BOSTON SCHOOLS FUND 31 HEATH STREET BOSTON, MA 02130		NC	GENERAL OPERATING SUPPORT	1,013,141
BOSTON SYMPHONY ORCHESTRA 301 MASSACHUSETTS AVENUE BOSTON, MA 02115		NC	GENERAL OPERATING SUPPORT	31,000
Total ▶ 3a				8,051,787

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BOYS AND GIRLS CLUBS OF BOSTON 50 CONGRESS STREET SUITE 730 BOSTON, MA 02109		NC	SHARED SPACE CLUBS	150,000
CATHOLIC RELIEF SERVICES 228 W LEXINGTON STREET BALTIMORE, MD 21201		NC	GENERAL OPERATING SUPPORT	25,000
CATHOLIC SCHOOLS FOUNDATION 67 BATTERYMARCH STREET 6TH FLOOR BOSTON, MA 02110		NC	PROGRAM EXPANSION	100,000
CITY YEAR BOSTON 285 COLUMBUS AVENUE BOSTON, MA 02116		NC	GENERAL OPERATING SUPPORT	25,000
COLLEGE BOUND DORCHESTER 18 SAMOSET STREET DORCHESTER, MA 02124		NC	PROGRAM EXPANSION	125,000
Total ► 3a				8,051,787

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CROSSROADS119 MYRTLE STREET DUXBURY, MA 02332		NC	PROGRAM EXPANSION	25,000
EAST BOSTON CENTRAL CATHOLIC 69 LONDON STREET BOSTON, MA 02128		NC	EARLY CHILDHOOD PROGRAM	16,470
EDNAVIGATOR646 MAGAZINE STREET NEW ORLEANS, LA 70130		NC	BOSTON PROGRAM LAUNCH	150,000
FACING HISTORY & OURSELVES 16 HURD ROAD BROOKLINE, MA 02445		NC	GENERAL OPERATING SUPPORT	5,000
FADICA 4201 CONNECTICUT AVENUE NW 505 WASHINGTON, DC 20008		NC	MEMBERSHIP	7,900
Total ▶ 3a				8,051,787

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
FIRST NIGHT FIRST DAY ONE DESIGN CENTER PLACE BOSTON, MA 02210		NC	GENERAL OPERATING SUPPORT	5,000
GOSNOLD INC200 TER HEUN DRIVE FALMOUTH, MA 02540		NC	PEDIATRIC & BEHAVIORAL HEALTH	50,000
HARMBE ENTREPRENEUR ALLIANCE 84 BRATTLE STREET 350B CAMBRIDGE, MA 02138		NC	HARVARD VATICAN LEADERSHIP SUMMIT	10,000
HARVARD MEDICAL SCHOOL 401 PARK DRIVE SUITE 22W BOSTON, MA 02215		NC	SYSTEMS BIOLOGY	250,000
HARVARD MEDICAL SCHOOL 401 PARK DRIVE SUITE 22W BOSTON, MA 02215		NC	DEAN FLIER FUND	50,000
Total ▶ 3a				8,051,787

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
INNERCITY WEIGHTLIFTING PO BOX 171313 BOSTON, MA 02117		NC	PROGRAM EXPANSION	88,951
LAWRENCE PUBLIC SCHOOLS 237 ESSEX STREET LAWRENCE, MA 01840		NC	PLANNING GRANT	19,191
LYNCH LEADERSHIP ACADEMY 140 COMMONWEALTH AVENUE CHESTNUT HILL, MA 02467		NC	GENERAL OPERATING SUPPORT	1,006,620
MALTESER INTERNATIONAL 75 VALENICA AVENUE SUITE 702 CORAL CABLES, FL 33134		NC	GENERAL OPERATING SUPPORT	20,000
MASSACHUSETTS GENERAL HOSPITAL 125 NASHUA STREET SUITE 540 BOSTON, MA 02114		NC	PACT PROGRAM	125,000
Total ► 3a				8,051,787

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MEDICINES FOR HUMANITY 800 HINGHAM STREET ROCKLAND, MA 02370		NC	CAMEROON PROGRAM SUPPORT	50,000
MENTOR NATIONAL MENTORING PARTNERSHIP 201 SOUTH STREET 6TH FLOOR BOSTON, MA 02111		NC	GENERAL OPERATING SUPPORT	25,000
MISSION GRAMMAR SCHOOL 94 ST ALPHONSUS STREET ROXBURY, MA 02120		NC	EARLY CHILDHOOD PROGRAM	116,470
MORE THAN WORDS56 FELTON STREET WALTHAM, MA 02453		NC	CAPITAL CAMPAIGN	100,000
MY BROTHER'S KEEPERPO BOX 338 EASTON, MA 02356		NC	CAPITAL CAMPAIGN & GENERAL OPERATING SUPPORT	125,000
Total ▶ 3a				8,051,787

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
NATIONAL COUNCIL ON TEACHER QUALITY 1120 G STREET NW SUITE 800 WASHINGTON, DC 20005		NC	MASSACHUSETTS PROGRAMMING	25,000
NATIONAL STROKE ASSOCIATION 9707 EAST EASTER LANE SUITE B CENTENNIAL, CO 80112		NC	MEMORIAL GIFT	250
NEW ENGLAND HISTORIC GENEALOGICAL SOCIETY 101 NEWBURY STREET BOSTON, MA 02116		NC	CAROLYN LYNCH GARDEN	50,000
NORTHEASTERN UNIVERSITY 360 HUNTINGTON AVENUE BOSTON, MA 02115		NC	BPS OPPORTUNITY INDEX	19,945
OUR LADY STAR OF THE SEA 85 ATLANTIC AVENUE MARBLEHEAD, MA 01945		NC	GENERAL OPERATING SUPPORT	25,000
Total ► 3a				8,051,787

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
PAPAL FOUNDATION 150 MONUMENT ROAD SUITE 600 BALA CYNWYD, PA 19004		NC	GENERAL OPERATING SUPPORT	25,000
PARTNERS IN HEALTH 888 COMMONWEALTH AVENUE 3RD FLOOR BOSTON, MA 02215		NC	GENERAL OPERATING SUPPORT	25,000
PEABODY ESSEX MUSEUM 161 ESSEX STREET SALEM, MA 01970		NC	CAROLYN AND PETER LYNCH EXHIBITION ENDOWMENT	500,000
PHILANTHROPY ROUNDTABLE 1150 17TH STREET NW SUITE 503 WASHINGTON, DC 20036		NC	K-12 EDUCATION PROGRAM	25,000
PINE STREET INN 444 HARRISON AVENUE BOSTON, MA 02118		NC	GENERAL OPERATING SUPPORT	5,000
Total ► 3a				8,051,787

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
POSSE FOUNDATION BOSTON 45 FRANKLIN STREET BOSTON, MA 02110		NC	GENERAL OPERATING SUPPORT	25,000
QUINCY CATHOLIC ACADEMY 370 HANCOCK STREET QUINCY, MA 02171		NC	EARLY CHILDHOOD PROGRAM	16,470
RED SOX FOUNDATION4 YAWKEY WAY BOSTON, MA 02215		NC	RED SOX SCHOLARS PROGRAM	25,000
RENEW INTERNATIONAL 1232 GEORGE STREET PAINFIELD, NJ 07062		NC	GENERAL OPERATING SUPPORT	25,000
ROSE FITZGERALD KENNEDY GREENWAY CONSERVANCY 185 KNEELAND STREET BOSTON, MA 02111		NC	LYNCH FAMILY GARDEN	760,000
Total ► 3a				8,051,787

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


Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SACRED HEART SCHOOL 1035 CANTERBURY STREET ROSLINDALE, MA 02131		NC	EARLY CHILDHOOD PROGRAM	41,370
SAINT JOHN PAUL II CATHOLIC ACADEMY 2200 DORCHESTER AVENUE DORCHESTER, MA 02124		NC	EARLY CHILDHOOD PROGRAM	65,879
SILICON VALLEY COMMUNITY FOUNDATION 2440 WEST EL CAMINO REAL SUITE 300 MOUNTAIN VIEW, CA 94040		NC	I2 LEARNING BOSTON STEM WEEK	200,000
SONTAG PRIZE IN URBAN EDUCATION 50 MILK STREET BOSTON, MA 02109		NC	PROGRAM EXPANSION	200,000
SOUTH BOSTON CATHOLIC ACADEMY 866 EAST BROADWAY BOSTON, MA 02127		NC	EARLY CHILDHOOD PROGRAM	28,920
Total ► 3a				8,051,787

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SPECIAL OLYMPICS INC 1133 19TH STREET NW WASHINGTON, DC 20036		NC	50TH ANNIVERSARY CAMPAIGN	250,000
ST FRANCIS HOUSE 39 BOYLSTON STREET BOSTON, MA 02116		NC	GENERAL OPERATING SUPPORT	1,000
ST JOHN SCHOOL 9 MOON STREET BOSTON, MA 02113		NC	EARLY CHILDHOOD PROGRAM	16,469
ST JOHN THE BAPTIST SCHOOL 19 CHESTNUT STREET PEABODY, MA 01960		NC	LYNCH SCHOLARS PROGRAM	4,000
ST MARY'S CENTER FOR WOMEN AND CHILDREN 90 CUSHING AVENUE DORCHESTER, MA 02125		NC	GENERAL OPERATING SUPPORT	1,000
Total ▶ 3a				8,051,787

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ST PATRICK SCHOOL 131 MT PLEASANT AVE ROXBURY, MA 02119		NC	EARLY CHILDHOOD PROGRAM	63,122
ST ROSE SCHOOL580 BROADWAY CHELSEA, MA 02150		NC	EARLY CHILDHOOD PROGRAM	16,469
SUMMER SEARCH BOSTON 500 ARMORY STREET JAMAICA PLAIN, MA 02130		NC	GENERAL OPERATING SUPPORT	25,000
TEACH FOR AMERICA MASSACHUSETTS 60 CANAL STREET 3RD FLOOR BOSTON, MA 02114		NC	PROGRAM EXPANSION	100,000
THE ACHIEVEMENT NETWORK 1 BEACON STREET BOSTON, MA 02108		NC	PROGRAM EXPANSION	200,000
Total ▶ 3a				8,051,787

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE BOSTON FOUNDATION 75 ARLINGTON STREET BOSTON, MA 02116		NC	NBC EDUCATION NATION	25,000
THE BRIDGESPAN GROUP 2 COPLEY PLACE 7TH FLOOR BOSTON, MA 02116		NC	LEADING FOR IMPACT BOSTON PROGRAM	100,000
THE ESPLANADE ASSOCIATION 376 BOYLSTON STREET SUITE 503 BOSTON, MA 02116		NC	WAYFINDING PROJECT	25,000
THE PHOENIX785 ALBANY STREET BOSTON, MA 02118		NC	BOSTON PROGRAM LAUNCH	550,000
THE POSSIBLE PROJECT 17 SELLERS STREET CAMBRIDGE, MA 02139		NC	GENERAL OPERATING SUPPORT	15,000
Total ▶ 3a				8,051,787

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE SAINTS ACADEMY 111 NEW BALCH ST BEVERLY, MA 01915		NC	LYNCH SCHOLARS PROGRAM	2,000
URBAN CATHOLIC TEACHER CORPS 25 LAWRENCE AVENUE CHESTNUT HILL, MA 02467		NC	GENERAL OPERATING SUPPORT	50,000
VALOR ACADEMY 2636 S MANSFIELD AVENUE LOS ANGELES, CA 90016		NC	GENERAL OPERATING SUPPORT	1,500
WGBH ONE GUEST STREET BOSTON, MA 02135		NC	NOVA PROGRAM SUPPORT	25,000
WHEELLOCK COLLEGE 200 RIVERWAY BOSTON, MA 02215		NC	LYNCH EARLY EDUCATION SCHOLARS	81,475
Total ▶ 3a				8,051,787

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
XAVERIAN BROTHERS HIGH SCHOOL 800 CLAPBOARD STREET WESTWOOD, MA 02090		NC	SCHOLARSHIP SUPPORT	50,000
Total 				8,051,787
3a				

TY 2017 Accounting Fees Schedule**Name:** THE LYNCH FOUNDATION**EIN:** 04-3017940**Accounting Fees Schedule**

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	55,764	0		66,035

TY 2017 Investments Corporate Stock Schedule**Name:** THE LYNCH FOUNDATION**EIN:** 04-3017940

Name of Stock	End of Year Book Value	End of Year Fair Market Value
PUBLICLY TRADED SECURITIES	110,039,213	110,039,213

TY 2017 Investments - Other Schedule

Name: THE LYNCH FOUNDATION

EIN: 04-3017940

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
PRIVATE EQUITY INVESTMENTS	FMV	5,654,350	5,654,350

TY 2017 Legal Fees Schedule**Name:** THE LYNCH FOUNDATION**EIN:** 04-3017940

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL	900	0		900

TY 2017 Other Expenses Schedule**Name:** THE LYNCH FOUNDATION**EIN:** 04-3017940**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MISCELLANEOUS EXPENSE	917	0		917
MEMBERSHIP	11,030	0		12,834
OFFICE EXPENSES	107,179	0		109,246
EVENTS	5,642	0		6,572

TY 2017 Other Increases Schedule

Name: THE LYNCH FOUNDATION
EIN: 04-3017940

Description	Amount
UNREALIZED GAIN ON INVESTMENTS	8,242,921

TY 2017 Other Liabilities Schedule**Name:** THE LYNCH FOUNDATION**EIN:** 04-3017940

Description	Beginning of Year - Book Value	End of Year - Book Value
DEFERRED EXCISE TAX	267,394	432,253

TY 2017 Other Professional Fees Schedule**Name:** THE LYNCH FOUNDATION**EIN:** 04-3017940

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	614,185	614,185		0
SOFTWARE	9,030	0		9,030
OTHER CONSULTANTS	22,800	0		20,678

TY 2017 Taxes Schedule**Name:** THE LYNCH FOUNDATION**EIN:** 04-3017940

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	5,500	5,500		0
PAYROLL TAXES	34,482	5,658		28,824
FEDERAL EXCISE TAX	576,560	0		0