

Form **990-PF**Department of the Treasury  
Internal Revenue Service**Return of Private Foundation**

or Section 4947(a)(1) Trust Treated as Private Foundation

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Go to [www.irs.gov/Form990PF](http://www.irs.gov/Form990PF) for instructions and the latest information.

OMB No 1545-0052

**2017**

Open to Public Inspection

For calendar year 2017 or tax year beginning

, and ending

Name of foundation <b>BERT L &amp; N KUGGIE VALLEE FOUNDATION, INC</b>		A Employer identification number <b>04-3333757</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>745 BOYLSTON STREET, 7TH FLOOR</b>	Room/suite	B Telephone number <b>617-859-6600</b>
City or town, state or province, country, and ZIP or foreign postal code <b>BOSTON, MA 02116</b>		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
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 <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ <b>55,017,678.</b>	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received		133,945.			
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		9,071.	9,071.		STATEMENT 1
4 Dividends and interest from securities		893,788.	893,788.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		782,015.			
b Gross sales price for all assets on line 6a <b>3,104,211.</b>					
7 Capital gain net income (from Part IV, line 2)			782,015.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income		69.	69.	0.	STATEMENT 3
12 Total. Add lines 1 through 11		1,818,888.	1,684,943.	0.	
13 Compensation of officers, directors, trustees, etc		234,100.	0.	0.	234,100.
14 Other employee salaries and wages					
15 Pension plans, employee benefits		13,277.	0.	0.	13,277.
16a Legal fees STMT 4		16,232.	0.	0.	16,232.
b Accounting fees STMT 5		15,012.	0.	0.	15,012.
c Other professional fees STMT 6		99,402.	86,402.	0.	13,000.
17 Interest					
18 Taxes STMT 7		30,335.	0.	0.	12,137.
19 Depreciation and depletion					
20 Occupancy		28,600.	0.	0.	28,600.
21 Travel, conferences, and meetings		180,189.	0.	0.	180,189.
22 Printing and publications					
23 Other expenses STMT 8		117,144.	0.	0.	117,144.
24 Total operating and administrative expenses. Add lines 13 through 23		734,291.	86,402.	0.	629,691.
25 Contributions, gifts, grants paid		1,329,215.			1,329,215.
26 Total expenses and disbursements. Add lines 24 and 25		2,063,506.	86,402.	0.	1,958,906.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<244,618.>			
b Net investment income (if negative, enter -0-)			1,598,541.		
c Adjusted net income (if negative, enter -0-)				0.	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1 Cash - non-interest-bearing	1,484,641.	929,845.	929,845.		
	2 Savings and temporary cash investments					
	3 Accounts receivable ▶					
	Less: allowance for doubtful accounts ▶					
	4 Pledges receivable ▶					
	Less: allowance for doubtful accounts ▶					
	5 Grants receivable					
	6 Receivables due from officers, directors, trustees, and other disqualified persons					
	7 Other notes and loans receivable ▶					
	Less: allowance for doubtful accounts ▶					
	8 Inventories for sale or use					
	9 Prepaid expenses and deferred charges					
	10a Investments - U.S. and state government obligations					
	b Investments - corporate stock					
	c Investments - corporate bonds					
	Liabilities	11 Investments - land, buildings and equipment basis ▶				
Less: accumulated depreciation ▶						
12 Investments - mortgage loans						
13 Investments - other						
14 Land, buildings, and equipment: basis ▶						
Less: accumulated depreciation ▶						
15 Other assets (describe ▶)		44,303,220.	44,613,398.	54,087,833.		
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		45,787,861.	45,543,243.	55,017,678.		
17 Accounts payable and accrued expenses						
18 Grants payable						
19 Deferred revenue						
20 Loans from officers, directors, trustees, and other disqualified persons						
21 Mortgages and other notes payable						
22 Other liabilities (describe ▶)						
23 Total liabilities (add lines 17 through 22)	0.	0.				
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26, and lines 30 and 31. <input type="checkbox"/>					
	24 Unrestricted					
	25 Temporarily restricted					
	26 Permanently restricted					
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input checked="" type="checkbox"/>					
	27 Capital stock, trust principal, or current funds	21,082,759.	21,082,759.			
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.			
	29 Retained earnings, accumulated income, endowment, or other funds	24,705,102.	24,460,484.			
30 Total net assets or fund balances	45,787,861.	45,543,243.				
31 Total liabilities and net assets/fund balances	45,787,861.	45,543,243.				

## 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	45,787,861.
2 Enter amount from Part I, line 27a	2	<244,618.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	45,543,243.
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	45,543,243.

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**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1a CAPITAL GAIN DISTRIBUTIONS</b>	<b>P</b>		<b>12/31/17</b>
<b>b SCHWAB-PUBLICLY TRADED SECURITIES</b>			
<b>c WELLINGTON- PUBLICLY TRADED SECURITIES</b>			
<b>d</b>			
<b>e</b>			

(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))
<b>a 380,309.</b>			<b>380,309.</b>
<b>b 2,637,500.</b>		<b>2,252,196.</b>	<b>385,304.</b>
<b>c 86,402.</b>		<b>70,000.</b>	<b>16,402.</b>
<b>d</b>			
<b>e</b>			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
<b>a</b>			<b>380,309.</b>
<b>b</b>			<b>385,304.</b>
<b>c</b>			<b>16,402.</b>
<b>d</b>			
<b>e</b>			

<b>2</b> 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 }	<b>2</b>	<b>782,015.</b>
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		<b>3</b>	<b>N/A</b>

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

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

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

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

☐ Yes ☒ No

If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part.

**1** Enter the appropriate amount in each column for each year; see the 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	<b>2,090,495.</b>	<b>45,912,734.</b>	<b>.045532</b>
2015			
2014			
2013			
2012			

<b>2</b> Total of line 1, column (d)	<b>2</b>	<b>.045532</b>
<b>3</b> Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	<b>3</b>	<b>.045532</b>
<b>4</b> Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	<b>4</b>	<b>51,247,639.</b>
<b>5</b> Multiply line 4 by line 3	<b>5</b>	<b>2,333,407.</b>
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	<b>15,985.</b>
<b>7</b> Add lines 5 and 6	<b>7</b>	<b>2,349,392.</b>
<b>8</b> Enter qualifying distributions from Part XII, line 4	<b>8</b>	<b>1,958,906.</b>

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	31,971.
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	31,971.
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	31,971.
6 Credits/Payments:			
a 2017 estimated tax payments and 2016 overpayment credited to 2017	6a	28,000.	
b Exempt foreign organizations - tax withheld at source	6b	0.	
c Tax paid with application for extension of time to file (Form 8868)	6c	0.	
d Backup withholding erroneously withheld	6d	0.	
7 Total credits and payments. Add lines 6a through 6d	7	28,000.	
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	3,971.	
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 <input type="checkbox"/> Refunded <input type="checkbox"/>	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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. 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.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. <input type="checkbox"/> MA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the tax year beginning in 2017? See the instructions for Part XIV. If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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**Part VII-A** Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	X	
Website address ► <u>THEVALLEEFOUNDATION.ORG</u>		
14 The books are in care of ► <u>ALEXA MASON</u>	Telephone no. ► <u>617-859-6600</u>	
Located at ► <u>745 BOYLSTON STREET, 7TH FLOOR, BOSTON, MA</u>		ZIP+4 ► <u>02116</u>
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	► <u>15</u> N/A	
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?	Yes	No
		X
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►		


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

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

	Yes	No
1a During the year, did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<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		
Organizations relying on a current notice regarding disaster assistance, check here	► <input type="checkbox"/>	
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?		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
If "Yes," list the years ►		
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.)	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	►	
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.)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017?		X

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

		Yes	No
<b>5a</b> 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 checked="" type="checkbox"/> Yes <input 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>b</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			
Organizations relying on a current notice regarding disaster assistance, check here 		<b>5b</b>	<b>X</b>
<b>c</b> 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? <b>N/A</b>			
If "Yes," attach the statement required by Regulations section 53.4945-5(d).			
<b>6a</b> 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>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		<b>6b</b>	<b>X</b>
If "Yes" to 6b, file Form 8870.			
<b>7a</b> 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>b</b> If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	<b>N/A</b>	<b>7b</b>	

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 10		234,100.	13,277.	0.

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

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

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

0

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(continued)

(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

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 VALLEE SCHOLARS PROGRAM - SEE ATTACHED DETAILED EXPLANATION

1,250,000.

2 VALLEE VISITING PROFESSORSHIPS - SEE ATTACHED DETAILED  
EXPLANATION

62,500.

3 THE LINDAU FELLOWSHIP PROGRAM - SEE ATTACHED DETAILED  
EXPLANATION

16,715.

4

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

Amount

1	N/A
---	-----

2

All other program-related investments. See instructions.

3

**Total. Add lines 1 through 3**

0.

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**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	50,860,038.
b	Average of monthly cash balances	1b	1,168,022.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	52,028,060.
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	52,028,060.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	780,421.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	51,247,639.
6	Minimum investment return. Enter 5% of line 5	6	2,562,382.

**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	2,562,382.
2a	Tax on investment income for 2017 from Part VI, line 5	2a	31,971.
b	Income tax for 2017. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	31,971.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	2,530,411.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	2,530,411.
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	2,530,411.

**Part XII** Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	1,958,906.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	1,958,906.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,958,906.

**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.

Form 990-PF (2017)



**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				2,530,411.
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only			177,434.	
b Total for prior years:		0.		
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	0.			
4 Qualifying distributions for 2017 from Part XII, line 4: ▶ \$ 1,958,906.				
a Applied to 2016, but not more than line 2a			177,434.	
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				1,781,472.
e Remaining amount distributed out of corpus	0.			
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	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2016. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2017. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018				748,939.
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	0.			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	0.			
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				

N/A

- ☐ 4942(j)(3) or ☐ 4942(j)(5)

- (4) Gross investment income

[illegible]

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b>				
LINDAU FELLOWS		I	VALLEE LINDAU FELLOWS	16,715.
CHRISTOPHER DOBSON UNIVERSITY OF CAMBRIDGE CAMBRIDGE, UNITED KINGDOM, UNITED KINGDOM	NONE	NC	VISITING PROFESSORSHIP PROGRAM	17,500.
MARTIN LOHSE INSTITUTE OF BIOCHEMISTRY ZURICH, SWITZERLAND, SWITZERLAND	NONE	NC	VISITING PROFESSORSHIP PROGRAM	17,500.
INDER VERMA 10010 N. TORREY PINES RD LA JOLLA, CA 92037	NONE	NC	VISTING PROFESSORSHIP PROGRAM	17,500.
ELAINE FUCHS 1230 YORK AVENUE, BOX 300 NEW YORK, NY 10065-6399	NONE	NC	VISITING PROFESSORSHIP PROGRAM	10,000.
<b>Total</b>	<b>SEE CONTINUATION SHEET(S)</b>			<b>1,329,215.</b>
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>				<b>0.</b>





**Part XV Supplementary Information****3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
PROF. VIVIANA GRADINARA CALIFORNIA INSTITUTE OF TECHNOLOGY PASADENA, CA 91125	NONE	NC	VISITING SCHOLARS PROGRAM	250,000.
PROF. THOMAS KEHL-FIE UNIVERSITY OF ILLINOIS CHAMPAIGN, IL 61820	NONE	NC	VISITING SCHOLARS PROGRAM	250,000.
PROF. DANIEL JAROSZ LELAND STANFORD JUNIOR UNIVERSITY PALO ALTO, CA 94304	NONE	NC	VISITING SCHOLARS PROGRAM	250,000.
PROF. SAMANTHA MORRIS WASHINGTON UNIVERSITY ST. LOUIS, MO 63110-4862	NONE	NC	VISITING SCHOLARS PROGRAM	250,000.
PROF. DANIEL ITZKOVITZ WEIZMANN INSTITUTE OF SCIENCE REHOVOT, ISRAEL, ISRAEL	NONE	NC	VISITING SCHOLARS PROGRAM	250,000.
<b>Total from continuation sheets</b>				<b>1,250,000.</b>

**Schedule B**(Form 990, 990-EZ,  
or 990-PF)Department of the Treasury  
Internal Revenue Service**Schedule of Contributors**

- ▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.  
▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No 1545-0047

**2017**

Name of the organization

BERT L &amp; N KUGGIE VALLEE FOUNDATION, INC

Employer identification number

04-3333757

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

- ☐ 501(c)( ) (enter number) organization
- ☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- ☐ 527 political organization

Form 990-PF

- ☒ 501(c)(3) exempt private foundation
- ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
- ☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000, or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$ \_\_\_\_\_

**Caution:** An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

Name of organization

Employer identification number

BERT L &amp; N KUGGIE VALLEE FOUNDATION, INC

04-3333757

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ESTATE OF BERT L VALLEE C/O MICHAEL O'CONNELL, RSB, 160 FEDERAL ST. 15TH FL  BOSTON, MA 02110	\$ 68,086.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	ESTATE OF NATALIE VALLEE C/O MICHAEL O'CONNELL, RSB, 160 FEDERAL ST. 15TH FL  BOSTON, MA 02110	\$ 58,914.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3	ESTATE OF VIOLET KUGRIS C/O MICHAEL O'CONNELL, RSB, 160 FEDERAL ST. 15TH FL  BOSTON, MA 02110	\$ 6,945.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)



Employer identification number

04-3333757

## Part II

[illegible]

Name of organization

Employer identification number

BERT L &amp; N KUGGIE VALLEE FOUNDATION, INC

04-3333757

**Part III**

Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year (Enter this info once) ▶ \$

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

## FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
INTEREST	9,071.	9,071.	9,071.
TOTAL TO PART I, LINE 3	9,071.	9,071.	9,071.

## FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
SCHWAB	632,871.	0.	632,871.	632,871.	632,871.
WELLINGTON	260,917.	0.	260,917.	260,917.	260,917.
TO PART I, LINE 4	893,788.	0.	893,788.	893,788.	893,788.

## FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
OTHER INCOME	69.	69.	0.
TOTAL TO FORM 990-PF, PART I, LINE 11	69.	69.	0.

## FORM 990-PF LEGAL FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	16,232.	0.	0.	16,232.
TO FM 990-PF, PG 1, LN 16A	16,232.	0.	0.	16,232.

## FORM 990-PF

## ACCOUNTING FEES

## STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING SERVICES	15,012.	0.	0.	15,012.
TO FORM 990-PF, PG 1, LN 16B	15,012.	0.	0.	15,012.

## FORM 990-PF

## OTHER PROFESSIONAL FEES

## STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	86,402.	86,402.	0.	0.
COMMITTEE HONORARIUM	13,000.	0.	0.	13,000.
TO FORM 990-PF, PG 1, LN 16C	99,402.	86,402.	0.	13,000.

## FORM 990-PF

## TAXES

## STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PAYROLL TAX	11,565.	0.	0.	11,565.
STATE FILING FEES	572.	0.	0.	572.
FEDERAL TAXES	18,198.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 18	30,335.	0.	0.	12,137.

## FORM 990-PF

## OTHER EXPENSES

## STATEMENT 8

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BOARD MEETINGS	52,664.	0.	0.	52,664.
SERVICES	34,503.	0.	0.	34,503.
PAYROLL	1,613.	0.	0.	1,613.
TELEPHONE, TELECOMMUNICATIONS	2,727.	0.	0.	2,727.
INSURANCE	9,360.	0.	0.	9,360.
GENERAL EXPENSES	9,267.	0.	0.	9,267.
PROFESSIONAL FEES	7,010.	0.	0.	7,010.
TO FORM 990-PF, PG 1, LN 23	117,144.	0.	0.	117,144.

## FORM 990-PF

## OTHER ASSETS

## STATEMENT 9

DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
CHARLES SCHWAB MUTUAL FUNDS	31,033,036.	31,413,215.	37,618,641.
WELLINGTON CTF	13,270,184.	13,200,183.	16,469,192.
TO FORM 990-PF, PART II, LINE 15	44,303,220.	44,613,398.	54,087,833.

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS  
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 10

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
S. JAMES ADELSTEIN, MD 180 LONGWOOD AVE, RM 207-A BOSTON, MA 02115	DIRECTOR/PAST PRESIDENT 5.00	8,000.	0.	0.
PETER CAMPOT 45 RIVER ROAD TOPSFIELD, MA 01983-2108	DIRECTOR/TREASURER 5.00	4,000.	0.	0.
LEWIS C CANTLEY CANCER CENTER, WEILL CORNELL MEDICAL COLLEGE, 1300 YORK AVE, F-905B NEW YORK, NY 10065	DIRECTOR 5.00	8,000.	0.	0.
JESPER Z HAEGGSTROM, MD, PHD DEPARTMENT OF PHYSIOLOGICAL CHEMISTRY II, KAROLINSKA INSTITUTET STOCKHOLM, SWEDEN S-171 77	DIRECTOR/SECRETARY 5.00	12,000.	0.	0.
GORDON G HAMMES 6545 VALEN WAY, F301 NAPLES, FL 34108	DIRECTOR/VICE PRESIDENT 5.00	8,000.	0.	0.
PETER HOWLEY, MD HARVARD MEDICAL SCHOOL, NEW RESEARCH BUILDING, ROOM 950A, 77 AVENUE LOUIS BOSTON, MA 02115	DIRECTOR/PRESIDENT 5.00	8,000.	0.	0.
SHEILA OHLUND SEESTRASSE 662 MEILEN, SWITZERLAND 8706	DIRECTOR 5.00	8,000.	0.	0.
ERNST-LUDWIG WINNACKER 14 RUE STOEBER STRASBOURG, FRANCE 6700	DIRECTOR 5.00	4,000.	0.	0.

ALEXA MASON BERT L. & N. KUGGIE VALLEE FOUNDATION INC; 745 BOYLSTON STREET, 7TH FLOOR BOSTON, MA 02116	EXECUTIVE DIRECTOR	35.00	162,100.	13,277.	0.
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MICHAEL F. O'CONNELL, JD C/O RACKEMANN, SAWYER & BREWSTER, 160 FEDERAL STREET, 15TH FL. BOSTON, MA 02110-1700	ASSISTANT SECRETARY	5.00	0.	0.	0.
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ELIZABETH HUIDEKOPER, MBA 7 TERN LANE SO. DARTMOUTH, MA 02748	DIRECTOR/ASST TREASURER	5.00	8,000.	0.	0.
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CAROL ROBINSON 2 MILL FARM BARNS MILL STREET OXFORD, UNITED KINGDOM OX5 2SX	DIRECTOR	5.00	4,000.	0.	0.
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LOUISE GROSS 420 EAST 79TH STREET, APT 5A NEW YORK, NY 10021	DIRECTOR	5.00	0.	0.	0.
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TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII

234,100.	13,277.	0.
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BERT L. AND N. KUGGIE VALLEE FOUNDATION, INC.

EIN: 04-3333757

FORM 990-PF

FYE: December 31, 2017

PART IX-A: SUMMARY OF DIRECT CHARITABLE ACTIVITIES

The organization directly serves the advancement of scientific education by (i) organizing and arranging short-term visiting professorships of distinguished scientists at universities and other research institutions in the United States and abroad, (ii) underwriting research by distinguished scientists and other scholars on biomedical research projects of specific interest to the organization, (iii) organizing and conducting seminars and symposia, and (iv) recognizing outstanding accomplishments in basic biomedical research.

The purpose of the organization's programs for – Vallee Visiting Professors (A), Vallee Scholars (B), Vallee Lindau Fellows (C), Vallee Symposia (D), the Bert and Natalie Vallee Awards, (E), and the Kuggie Vallee Distinguished Lectures (F) - is to facilitate interactions among productive scientists, to expose dedicated students and researchers to scientists who are making outstanding contributions towards the understanding of scientific principles as they relate to human biology, and to support young independent investigators in the early part of their career who are doing cutting-edge research. As part of the educational and scientific activities and functions occurring during the tenure of these scientific researchers, the organization arranges symposia, tutorials, lectures and conferences for other scientists, non-scientists and students.

During the fiscal year,

A) Vallee Visiting Professorship Program

The organization organized and funded the research programs of the following visiting research scholars at the following institutions:

**Visiting Professors (Affiliation)**

**At Institution**

Dr Christopher Dobson (University of Cambridge)

At University of Florence, Italy

Dr Elaine Fuchs (The Rockefeller University)

At Institute for Research in Biomedicine, Barcelona, Spain

Dr Martin Lohse (Max Delbrück Center in Berlin, Germany)

At Stanford University

Dr Inder Verma (The Salk Institute for Biological Sciences)

At Laboratory of Molecular Biology, University of Cambridge



BERT L. AND N. KUGGIE VALLEE FOUNDATION, INC.

EIN: 04-3333757

FORM 990-PF

FYE: December 31, 2017

(B) The Vallee Scholars Program

The organization granted funding for the following research scholars through their academic institutions:

**Vallee Scholar Awards paid in 2017**

California Institute of Technology	for Dr Viviana Gradinaru
The Board of Trustees of the University of Illinois	for Dr Thomas Kehl-Fie
Board of Trustees of the Leland Stanford Junior University	for Dr Daniel Jarosz
The Washington University	for Dr Samantha Morris
Weizmann Institute of Science	for Dr Shalev Itzkovitz

(C) The Lindau Fellowship program

The organization made a grant to the Lindau Nobel Laureate Meetings Foundation to cover travel expenses for four young scientists to attend the June 2017 Lindau Nobel laureate Meeting.

(D) Vallee Symposia Program

The organization organized, funded, and operated a Vallee Scholars Meeting in June 2017 in Boston, USA, which was devoted to the Vallee Scholars, the younger generation of basic biomedical researchers supported by the Bert L & N Kuggie Vallee Foundation. Seven of the 14 Vallee Scholars appointed to date spoke on June 23 to an audience made up of their Vallee Scholar colleagues as well as a handful of Vallee Visiting Professors and local scientists.

(E) The Bert and Kuggie Vallee Award in Biomedical Science.

No Award was granted in 2017.

(F) The Kuggie Vallee Distinguished Lectures

There was no Kuggie Vallee Distinguished Lecture in 2017.