

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	6,177	664		664	
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____		0		0	
	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 ▶ _____ 0					
	8	Inventories for sale or use					
	9	Prepaid expenses and deferred charges					
	10a	Investments—U S and state government obligations (attach schedule)					
	b	Investments—corporate stock (attach schedule)	104,760	99,538		269,009	
	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)	106,727	106,727		106,727	
	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)	217,664	206,929		376,400		
Liabilities	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 (attach schedule)					
	22	Other liabilities (describe ▶ _____)					
	23	Total liabilities (add lines 17 through 22)		0			
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.						
	24	Unrestricted					
	25	Temporarily restricted					
	26	Permanently restricted					
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.						
	27	Capital stock, trust principal, or current funds	217,664	206,929			
	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)	217,664	206,929			
31	Total liabilities and net assets/fund balances (see instructions) .	217,664	206,929				

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	217,664
2	Enter amount from Part I, line 27a	2	90,889
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	308,553
5	Decreases not included in line 2 (itemize) ▶ _____	5	101,624
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	206,929

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 100 EXPEDITORS INTL WASH INC		2004-01-21	2017-05-12
b 64 JOHNSON & JOHNSON		1979-03-06	2017-06-07
c 661 JOHNSON & JOHNSON		1979-03-06	2017-11-13
d 8 JOHNSON & JOHNSON		1979-03-06	2017-12-21
e 100 STERICYCLE INC		2006-03-16	2017-09-06

(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 5,251		1,952	3,299
b 8,369		90	8,279
c 92,111		933	91,178
d 1,128		11	1,117
e 7,021		3,270	3,751

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			3,299
b			8,279
c			91,178
d			1,117
e			3,751

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	107,624
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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	214,315	262,817	0 815453
2015	217,704	245,139	0 888084
2014	211,806	251,011	0 843812
2013	193,730	235,249	0 82351
2012	201,309	230,896	0 87186

2 Total of line 1, column (d)	2	4 242719
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 848544
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	361,044
5 Multiply line 4 by line 3	5	306,362
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,060
7 Add lines 5 and 6	7	307,422
8 Enter qualifying distributions from Part XII, line 4	8	172,049

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 ☐ 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 ☐ and enter 1% of Part I, line 27b	1	2,121
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	2,121
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	2,121
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	
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	
7	Total credits and payments. Add lines 6a through 6d.	7	0
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	63
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed ▶	9	2,184
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 ▶ 0 Refunded ▶	11	0

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	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ MA _____		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i> .	8b	Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the taxable year beginning in 2017 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9	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 ►	13	Yes	
14	The books are in care of ► <u>WELCH & FORBES LLC, C/O MICHAEL BEAN</u> Telephone no ► <u>(617) 523-1635</u>			

Located at ► 45 SCHOOL STREET BOSTON MA ZIP+4 ► 02108

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here	☐		
	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?	16	Yes	No
	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 ►			

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?	☐ Yes ☒ No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ 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)?	☐ Yes ☒ 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).	☐ Yes ☒ 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)?		1b	
	Organizations relying on a current notice regarding disaster assistance check here.	► ☐		
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?		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?	☐ Yes ☒ 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).		2b	No
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?	☐ Yes ☒ 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).		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))? ☐ Yes ☒ No (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). ☐ Yes ☒ No (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No			
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? ☐ Yes ☒ No Organizations relying on a current notice regarding disaster assistance check here. ☐ 	5b		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ 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? ☐ Yes ☒ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No <i>If "Yes" to 6b, file Form 8870</i>	6b		No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No	7b		

Part VIII

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

1

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

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

2

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

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

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

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	259,815
b	Average of monthly cash balances.	1b	0
c	Fair market value of all other assets (see instructions).	1c	106,727
d	Total (add lines 1a, b, and c).	1d	366,542
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	366,542
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	5,498
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	361,044
6	Minimum investment return. Enter 5% of line 5.	6	18,052

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	18,052
2a	Tax on investment income for 2017 from Part VI, line 5.	2a	2,121
b	Income tax for 2017 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	2,121
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	15,931
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	15,931
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	15,931

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	172,049
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	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	172,049
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	172,049

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				15,931
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.	190,958			
b From 2013.	182,686			
c From 2014.	202,831			
d From 2015.	209,469			
e From 2016.	204,345			
f Total of lines 3a through e.	990,289			
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ 172,049				
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.				15,931
e Remaining amount distributed out of corpus	156,118			
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	1,146,407			
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).	190,958			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	955,449			
10 Analysis of line 9				
a Excess from 2013.	182,686			
b Excess from 2014.	202,831			
c Excess from 2015.	209,469			
d Excess from 2016.	204,345			
e Excess from 2017.	156,118			

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

1 Information Regarding Foundation Managers:

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

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

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

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

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

- c Any submission deadlines

- Form
- 990-PF**
- (2017)

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	172,049
b <i>Approved for future payment</i>				
Total			3b	

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments.					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities.			14	3,302	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	107,624	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a _____					
b _____					
c _____					
d _____					
e _____					
12 Subtotal. Add columns (b), (d), and (e). . .				114,098	
13 Total. Add line 12, columns (b), (d), and (e).			13		114,098

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

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

	Yes	No
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1a(1)		No
1a(2)		No

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

[illegible]

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

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

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

**Sign
Here**

* * * * *

2018-04-30

* * * * *

Signature of officer or trustee

Date _____

Title

May the IRS discuss this return with the preparer shown below

(see instr)? ☒ Yes ☐ No

**Paid
Preparer
Use Only**

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
	WAYNE R KURPIEL		2018-04-30		
	Firm's name ▶ WELCH & FORBES LLC				Firm's EIN ▶
	Firm's address ▶ 45 SCHOOL STREET BOSTON, MA 021083204				Phone no (617) 523-1635

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
EDITH L DABNEY	TRUSTEE 1	0		
45 SCHOOL STREET 5TH FLOOR BOSTON, MA 02108				
JOHN H KNOWLES JR	TRUSTEE 1	0		
45 SCHOOL STREET 5TH FLOOR BOSTON, MA 02108				
EDITH K WILLIAMS	TRUSTEE 1	0		
45 SCHOOL STREET 5TH FLOOR BOSTON, MA 02108				
THOMAS M WILLIAMS	TRUSTEE 1	0		
45 SCHOOL STREET 5TH FLOOR BOSTON, MA 02108				
JEAN KNOWLES HEDLUND	TRUSTEE 1	0		
45 SCHOOL STREET 5TH FLOOR BOSTON, MA 02108				
JAMES T KNOWLES	TRUSTEE 1	0		
45 SCHOOL STREET 5TH FLOOR BOSTON, MA 02108				
ROBERT M KNOWLES	TRUSTEE 1	0		
45 SCHOOL STREET 5TH FLOOR BOSTON, MA 02108				
THEODORE E OBER	TRUSTEE 1	0		
45 SCHOOL STREET 5TH FLOOR BOSTON, MA 02108				

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>				
ACORD Food Pantry69 WILLOW STREET Hamilton, MA 01982	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	250
American Red Cross of Mass 139 MAIN STREET SUITE 1 CAMBRIDGE, MA 02142	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,500
Animal Rescue League of BOSTON 10 CHANDLER ST BOSTON, MA 02116	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,000
Annisquam Village Church 820 WASHINGTON STREET Annisquam, MA 01930	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	150
Belmont Hill School 350 PROSPECT STREET BELMONT, MA 02178	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	750
Total ▶ 3a				172,049

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>				
Beverly Bootstraps Food Pantry Inc 371 CABOT STREET Beverly, MA 01915	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	250
BOSTON SYMPHONY ORCHESTRA 301 MASSACUHSETTS AVENUE BOSTON, MA 02115	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	12,000
Brookwood SchoolPO BOX 1429 Manchester, MA 01944	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	250
Buckingham Browne & Nichols School 80 GERRYS LANDING ROAD CAMBRIDGE, MA 02138	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	250
Buckley School113 EAST 73RD STREET New York, NY 01121	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	250
Total 3a				172,049

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>				
Campaign For A Commercial-Free CHILDHOOD53 PARKER HILL AVENUE BOSTON, MA 02120	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	250
CARE USA151 ELLIS STREETNE ATLANTA, GA 30303	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,000
Children's Cancer Research Fund PO BOX 7006 ALBERT LEA, MN 56007	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,000
Children's Home of Poughkeepsie 10 CHILDRENS WAY Poughkeepsie, NY 12601	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	500
Children Incorporated 4205 DOVER ROAD Richmond, VA 23221	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,000
Total ▶ 3a				172,049

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>				
Christian Children's Fund 2821 EMERYWOOD PKWYBOX 26484 Richmond, VA 26484	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,000
Christopher and Dana Reeve Foundation 636 MORRIS TURNPIKESUITE 3A Short Hills, NJ 07078	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,000
Coalition for Buzzards Bay 620 BELLEVILLE AVENUE NEW BEDFORD, MA 02745	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	250
Columbia University 622 W 113TH ST MAIL CODE 4524 new york, NY 10025	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	150
Conservation Law Foundation 62 SUMMER STREET BOSTON, MA 02210	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,500
Total ► 3a				172,049

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>				
Dexter School20 NEWTON STREET BROOKLINE, MA 02445	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	650
Doctors Without Borders 333 SEVENTH AVE 2ND FLOOR New York, NY 10001	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,000
Environmental Defense Fund 1875 CONNECTICUT AVENW Washington, DC 20009	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,000
Epilepsy Foundation 8301 PROFESSIONAL PLACE Landover, MD 20785	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,000
Esperanza Academy 198 GARDEN STPO BOX 4175 Lawrence, MA 01843	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	200
Total ▶ 3a				172,049

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>				
Essex County Greenbelt 82 EASTERN AVENUE Essex, MA 01929	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	350
First Church in Chestnut Hill 26 SUFFOLK ROAD CHESTNUT HILL, MA 02467	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	3,000
Food Bank of the Hudson Valley 195 HUDSON STREET CornwallonHudson, NY 12520	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	500
Harvard College 124 MOUNT AUBURN STREET CAMBRIDGE, MA 02138	NONE	PUBLIC	CLASS ENDOWMENT PROGRAM	1,250
Home for Little Wanderers 271 HUNTINGTON AVENUE BOSTON, MA 02115	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,000
Total ► 3a				172,049

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>				
Horizons for Homeless Children 1705 COLUMBUS AVENUE Roxbury, MA 02119	NONE	PUBLIC	UNRESTRICTED	500
Ipswich River Watershed Assn Inc PO BOX 576 Ipswich, MA 01938	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	250
Jackson Laboratory610 MAIN STREET BAR HARBOR, ME 04609	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,500
Landmark School429 HALE STREET Prides Crossing, MA 01965	NONE	PUBLIC	ANNUAL FUND \$250 AND	250
Leukemia & Lymphoma Society PO BOX 4072 PITTSFIELD, MA 01202	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,000
Total ► 3a				172,049

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>				
Make-a-Wish Foundation of the HUDSON VALLEYPO BOX 97104 Washington, DC 20090	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	500
Manchester Community Center BOX 212HARBORS POINT Manchester, MA 01944	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	100
Manchester Public Library 15 UNION STREET MANCHESTER, MA 01944	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	100
Massachusetts Audubon Society 208 SOUTH GREAT ROAD Lincoln, MA 01773	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,250
Massachusetts General Hospital 165 CAMBRIDGE STSUITE 600 BOSTON, MA 02114	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,500
Total ▶ 3a				172,049

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>				
Massachusetts Society for the Prevention of Cruelty to Children 99 SUMMER STREET BOSTON, MA 02110	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	250
McLean Hospital115 MILL STREET BELMONT, MA 02478	NONE	PUBLIC	ANNUAL FUND \$5,000 CAPITAL	5,000
Memorial Sloan-Kettering Cancer Cen 633 THIRD AVENUE 28TH FLOOR NEW YORK, NY 10017	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,000
MGH INSTITUTE OF HEALTH PROFESSIONALS36 FIRST AVENUE BOSTON, MA 02129	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	18,000
Museum of ScienceSCIENCE PARK BOSTON, MA 02114	NONE	PUBLIC	ANNUAL FUND \$2,500 CAPITAL	2,500
Total ▶ 3a				172,049

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>				
Nativity Preparatory School 39 LAMARTINE STREET Jamaica Plain, MA 02130	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	500
Nature Conservancy 205 PORTLAND STREETSUITE 4000 BOSTON, MA 02114	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	250
NORTH SHORE UNITED WAY 248 CABOT STREET BEVERLY, MA 01915	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	250
Ohio Wesleyan University 61 S SANDUSKY STREET Delaware, OH 43015	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	250
Phillips Brooks House HARVARD UNIVERSITY CAMBRIDGE, MA 02138	NONE	PUBLIC	UNRESTRICTED	250
Total ▶ 3a				172,049

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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>				
PINGREE SCHOOL 537 HIGHLAND STREET SOUTH HAMILTON, MA 01982	NONE	PUBLIC	ANNUAL FD \$2,000 AND CAP	750
PLAN INTERNATIONAL USA 155 PLAN WAY WARWICK, RI 02886	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,000
Salvation Army147 BERKELEY STREET BOSTON, MA 02116	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,000
Scenic Hudson Inc ONE CIVIC CENTER PLAZASUITE 200 Poughkeepsie, NY 12601	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	500
Shore Country Day School 545 CABOT STREET BEVERLY, MA 01915	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	500
Total ▶ 3a				172,049

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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>				
Smith College33 ELM STREET Northampton, MA 01063	NONE	PUBLIC	THE SMITH FUND	2,500
Spaulding Education FundPO BOX 192 Manchester, MA 01944	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	100
St John's EPISCOPAL Church 705 HALE STREET Beverly, MA 01915	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	250
St Lawrence University 23 ROMODA DRIVE CANTON, NY 13617	NONE	PUBLIC	PARENTS FUND	8,334
St Luke's Hospital SouthCoast Health System 101 PAGE STREET NEW BEDFORD, MA 02740	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,000
Total ▶ 3a				172,049

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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>				
Trustees of Reservations 572 ESSEX STREET BEVERLY, MA 01915	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	2,500
United Way of Massachusetts Bay 51 SLEEPER STREET BOSTON, MA 02210	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	6,000
US Fund for UNICEF125 MAIDEN LANE NEW YORK, NY 10038	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,000
Veterans of Foreign Wars of the US 200 MARYLAND AVENUE NE WASHINGTON, DC 20002	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,000
WBGH Educational Foundation 125 WESTERN AVENUE BOSTON, MA 02134	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	12,000
Total ▶ 3a				172,049

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>				
WBUR Radio Station Boston UNIVERSITY 890 COMMONWEALTH AVENUE BOSTON, MA 02215	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	365
Wellspring House302 ESSEX AVENUE Gloucester, MA 01930	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	5,250
Wenham Museum132 MAIN STREET WENHAM, MA 01984	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	250
Westminster SchoolPO BOX 337 SIMSBURY, CT 06070	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	250
Winsor SchoolPO BOX 414068 BOSTON, MA 02241	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	2,500
Total 3a				172,049

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>				
CAMP KIEVEPO BOX 169 NOBLEBORO, ME 04555	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	250
FUND TO PREVENT HOMELESSNESS PO BOX 17 MANCHESTER, MA 01944	NONE	EXEMPT	UNRESTRICTED FOR GENERAL	100
EVELYN LILLY LUTZ FOUNDATION BEVERLY HOSPITAL BEVERLY, MA 01915	NONE	EXEMPT	UNRESTRICTED FOR GENERAL	500
NATIONAL RELIEF CHARITIES PARTNERSHIP IN GIVINGPO BOX 118 ELKWOOD, VA 22718	NONE	EXEMPT	UNRESTRICTED FOR GENERAL	1,000
NATONAL WILDLIFE FEDERATION 11000 WILDLIFE CENTER DRIVE RESTON, VA 20190	NONE	EXEMPT	UNRESTRICTED FOR GENERAL	500
Total ▶ 3a				172,049

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>				
FOOD PROJECT10 LEWIS STREET LINCOLN, MA 01773	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	200
YMCA OF THE NORTH SHORE 245 CABOT STREET BEVERLY, MA 01915	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	500
Stop Handgun Voilence 1 BRIDGE STREET Newton, MA 02458	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	250
ESSEX COUNTY COMMUNITY FOUNDATION 175 ANDOVER ST Danvers, MA 01923	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	2,500
PROCTOR ACADEMY204 MAIN ST ANDOVER, NH 03216	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	25,000
Total ▶ 3a				172,049

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>				
POLICE ASSISTED ADDICTION AND RECOVERY INITIATIVE ONE BRIDGE STREET NEWTON, MA 02458	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	500
CHANGE IS SIMPLE INC8 ENON STREET BEVERLY, MA 01915	NONE	EXEMPT	UNRESTRICTED	20,000
Weelock College200 RIVERWAY Boston, MA 02215	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	500
Beverly Hospital85 HERRICK ST Beverly, MA 01915	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	1,500
Wounded Warrior Project 4899 BELFORT ROAD SUITE 300 Jacksonville, FL 32256	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	500
Total 3a				172,049

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>				
Ulster County Habitat for Hummanity 406 NY-28 Kingston, NY 12401	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	500
International Medical Corps 12400 WILSHIRE BLVD Los Angeles, CA 90025	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	500
Women's Fund of Essex County 175 ANDOVER STREET SUITE 101 Danvers, MA 01923	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	250
Roots NS Inc 35 CONGRESS ST SUITE 2350 Salem, MA 01970	NONE	PUBLIC	UNRESTRICTED FOR GENERAL	500
Total 				172,049
3a				

TY 2017 Accounting Fees Schedule**Name:** KENWOOD FOUNDATION 7569-XXXXXX21240**EIN:** 04-6012784**Accounting Fees Schedule**

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION FEE	3,460	3,460		

TY 2017 Distribution from Corpus Election

Name: KENWOOD FOUNDATION 7569-XXXXXX21240

EIN: 04-6012784

Election: IN ACCORDANCE WITH SECTIONS 4942(h)(2) AND REG 53-4942 (a)-3(d)(2), OF THE INTERNAL REVENUE CODE, THE KENWOOD FOUNDATION HEREBY ELECTS TO TREAT CERTAIN CURRENT-YEAR QUALIFYING DISTRIBUTIONS IN EXCESS OF THE IMMEDIATELY PRECEDING TAX YEAR'S UNDISTRIBUTED INCOME AS BEING MADE FROM CORPUS. IN 2017 THE FOUNDATION RECEIVED \$169,911 OF CONTRIBUTIONS OF SECURITIES AND CASH FROM VARIOUS INDIVIDUALS. THE FOUNDATION'S DISTRIBUTABLE AMOUNT FOR 2017 WAS \$15,931. THE FOUNDATION MADE QUALIFYING DISTRIBUTIONS IN 2017 IN THE AMOUNT OF \$193,120. WITH RESPECT TO 2017 CONTRIBUTIONS RECEIVED, \$156,118 WAS DISTRIBUTED OUT OF CORPUS, TO WHICH THIS ELECTION APPLIES. THE EXCESS DISTRIBUTION CARRYOVER TO 2018 TOTALS \$955,449

TY 2017 Investments Corporate Stock Schedule

Name: KENWOOD FOUNDATION 7569-XXXXXX21240
EIN: 04-6012784

Name of Stock	End of Year Book Value	End of Year Fair Market Value
100 ABBOTT LAB	24	5,707
225 CARMAX INC	2,245	14,429
150 DANAHER CORP	3,083	13,923
100 SHS EXPEDITORS INTERNATION		
100 JOHNSON & JOHNSON	141	13,972
175 MICROSOFT CORP	444	14,970
100 PEPSICO INC	3,528	11,992
100 STRYKER CORP	4,368	15,484
150 ANSYS INC	4,180	22,138
125 IDEXX LABORATORIES INC	3,183	19,548
100 PROCTER & GAMBLE CO	1,032	9,188
100 STERICYCLE INC		
75 PRAXAIR	5,424	11,601
100 AFLAC	4,320	8,778
100 ECHOLAB INC	4,529	13,418
100 LANCASTER COLONY CORP	5,351	12,921
150 TORONTO DOMINION BANK	4,925	8,787
150 WELLS FARGO & CO	5,175	9,100
25 FACEBOOK INC CLASS A	2,199	4,412
10 METTLER TOLEDO INTERNATIONALA	3,433	6,195
25 MIDLEBY CORP	2,834	3,374
25 ROPER TECHNOLOGIES INC	4,394	6,475
50 VISA CLASS A SHARES	3,437	5,701
100 CHURCH & DWIGHT CO INC	4,144	5,017
5 ALPHABET INC CAP STK C	3,695	5,232
40 CELEGEN CORP	4,029	4,174
35 FISERV INC	3,498	4,590
30 HOME DEPOT INC	3,917	5,686
15 OREILLY AUTOMOTIVE INC	4,133	3,608
55 TJX COS INC	4,284	4,205

Name of Stock	End of Year Book Value	End of Year Fair Market Value
30 CHUBB LIMITED	3,589	4,384

TY 2017 Investments - Other Schedule

Name: KENWOOD FOUNDATION 7569-XXXXXX21240

EIN: 04-6012784

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
SAVINGS BANK LIFE INS POLICY	AT COST	106,727	106,727

TY 2017 Other Decreases Schedule

Name: KENWOOD FOUNDATION 7569-XXXXXX21240

EIN: 04-6012784

Description	Amount
ADJUST 2017 CONTRIBUTIONS TO TAX COST	101,624

TY 2017 Other Expenses Schedule**Name:** KENWOOD FOUNDATION 7569-XXXXXX21240**EIN:** 04-6012784**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LIFE INSURANCE EXPENSE	11,859	0		0

TY 2017 Other Income Schedule

Name: KENWOOD FOUNDATION 7569-XXXXXX21240

EIN: 04-6012784

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
EXCISE TAX REFUND	3,172	0	

TY 2017 Other Professional Fees Schedule**Name:** KENWOOD FOUNDATION 7569-XXXXXX21240**EIN:** 04-6012784

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	1,380	1,380		

TY 2017 Taxes Schedule**Name:** KENWOOD FOUNDATION 7569-XXXXXX21240**EIN:** 04-6012784

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	41	41		0
PRIOR YEAR EXCISE TAX	1,159	0		0
FEDERAL ESTIMATED TAX	3,172	0		0

efile GRAPHIC print - DO NOT PROCESS		As Filed Data -		DLN: 93491123009558	
Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service		Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990			OMB No 1545-0047 2017
		Name of the organization KENWOOD FOUNDATION 7569-XXXXXX21240			Employer identification number 04-6012784
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 other 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 33¹ 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 <i>exclusively</i> 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 <i>exclusively</i> 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 <i>exclusively</i> religious, charitable, etc., purpose. Don't complete any of the parts unless the General Rule applies to this organization because it received <i>nonexclusively</i> 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 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).					
For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF Cat No 30613X Schedule B (Form 990, 990-EZ, or 990-PF) (2017)					

Name of organization KENWOOD FOUNDATION 7569-XXXXXX21240	Employer identification number 04-6012784
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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
<u>1</u>	EDITH L DABNEY C/O WELCH FORBES LLC 45 SCHOOL STREET BOSTON, MA02108	\$ 67,500	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
<u>2</u>	JAMES T KNOWLES C/O WELCH FORBES LLC 45 SCHOOL STREET BOSTON, MA02108	\$ 20,950	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
<u>3</u>	JEAN KNOWLES HEDLUND C/O WELCH FORBES LLC 45 SCHOOL STREET BOSTON, MA02108	\$ 3,937	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
<u>4</u>	JOHN H KNOWLES C/O WELCH FORBES LLC 45 SCHOOL STREET BOSTON, MA02108	\$ 25,641	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
<u>5</u>	ROBERT M KNOWLES C/O WELCH FORBES LLC 45 SCHOOL STREET BOSTON, MA02108	\$ 51,883	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
<u> </u>		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization KENWOOD FOUNDATION 7569-XXXXXX21240	Employer identification number 04-6012784
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Part II Noncash Property (See instructions) Use duplicate copies of Part II if additional space is needed			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
2	149 shs Johnson & Johnson	\$ 20,950	2017-11-09
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
3	28 shs Johnson & Johnson	\$ 3,937	2017-11-09
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
4	187 shs Johnson & Johnson	\$ 25,641	2017-12-19
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
5	369 shs Johnson & Johnson	\$ 51,883	2017-11-09
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	

Name of organization KENWOOD FOUNDATION 7569-XXXXXX21240	Employer identification number 04-6012784
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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 information once. See instructions.) ▶ \$ _____ Use duplicate copies of Part III if additional space is needed
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(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	
(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	
(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	
(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	