

Form **990-PF****Return of Private Foundation**
or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

2017

Open to Public Inspection

Department of the Treasury
Internal Revenue Service▶ Do not enter social security numbers on this form as it may be made public.
▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

For calendar year 2017 or tax year beginning

, and ending

Name of foundation ABBOT & DOROTHY H. STEVENS FOUNDATION		A Employer identification number 04-6107991
Number and street (or P.O. box number if mail is not delivered to street address) P.O. BOX 111	Room/suite	B Telephone number (see instructions) 978-688-7211
City or town, state or province, country, and ZIP or foreign postal code NORTH ANDOVER MA 01845		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <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 04		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) ▶ \$ 26,373,236	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) (see instructions))

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue				
1 Contributions, gifts, grants, etc., received (attach schedule)				
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	494,112	494,112		
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	662,668			
b Gross sales price for all assets on line 6a	662,668			
7 Capital gain net income (from Part IV, line 2)		662,668		
8 Net short-term capital gain			0	
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule) STMT 1	355,796	342,868		
12 Total. Add lines 1 through 11	1,512,576	1,499,648	0	
Operating and Administrative Expenses				
13 Compensation of officers, directors, trustees, etc	0			
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule)				
b Accounting fees (attach schedule)				
c Other professional fees (attach schedule) STMT 2	110,992	110,992		
17 Interest	374	374		
18 Taxes (attach schedule) (see instructions) STMT 3	12,247	11,997		
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (att sch) STMT 4	189,592	81,442		108,150
24 Total operating and administrative expenses. Add lines 13 through 23	313,205	204,805	0	108,150
25 Contributions, gifts, grants paid	1,298,421			1,298,421
26 Total expenses and disbursements. Add lines 24 and 25	1,611,626	204,805	0	1,406,571
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	-99,050			
b Net investment income (if negative, enter -0-)		1,294,843		
c Adjusted net income (if negative, enter -0-)			0	

For Paperwork Reduction Act Notice, see instructions.

Form **990-PF** (2017)

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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	47,524	7,701	7,701
	2 Savings and temporary cash investments	974,277	1,292,422	1,292,422
	3 Accounts receivable ▶ Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶ Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (att 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) SEE STMT 5	13,744,011	13,346,413	18,223,149
	c Investments – corporate bonds (attach schedule) SEE STMT 6	6,395,640	6,918,457	6,849,964
	11 Investments – land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch) ▶			
	12 Investments – mortgage loans			
	13 Investments – other (attach schedule)			
	14 Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch) ▶			
	15 Other assets (describe ▶ SEE STATEMENT 7)	1,113		
	16 Total assets (to be completed by all filers – see the instructions Also, see page 1, item I)	21,162,565	21,564,993	26,373,236
Liabilities	17 Accounts payable and accrued expenses		500,000	
	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 ▶ SEE STATEMENT 8)		1,478	
	23 Total liabilities (add lines 17 through 22)	0	501,478	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input checked="" type="checkbox"/>			
	24 Unrestricted	21,162,565	21,063,515	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input type="checkbox"/>			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see instructions)	21,162,565	21,063,515	
	31 Total liabilities and net assets/fund balances (see instructions)	21,162,565	21,564,993	

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	21,162,565
2 Enter amount from Part I, line 27a	2	-99,050
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	21,063,515
5 Decreases not included in line 2 (itemize) ▶	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	21,063,515

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.)
1a	PUBLICLY TRADED SECURITIES	P		
b	PUBLICLY TRADED SECURITIES	P		
c	BBH FORM 1099-DIV			
d	UNRECAPTURED SECTION 1250			
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a 542,492			542,492
b 8,047			8,047
c 110,781			110,781
d 1,348			1,348
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(j) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (j) over col. (i), if any	
a			542,492
b			8,047
c			110,781
d			1,348
e			

2 Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	2	662,668
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	8,047

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 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	1,886,772	30,002,079	0.062888
2015	1,432,109	24,595,483	0.058227
2014	1,210,850	25,315,994	0.047829
2013	1,305,468	24,050,704	0.054280
2012	943,533	21,781,340	0.043318

2 Total of line 1, column (d)	2	0.266542
3 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	3	0.053308
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	23,529,873
5 Multiply line 4 by line 3	5	1,254,330
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	12,948
7 Add lines 5 and 6	7	1,267,278
8 Enter qualifying distributions from Part XII, line 4 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	8	1,873,654

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 checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	12,948
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	12,948
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	12,948
6	Credits/Payments:		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	39,772
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	39,772
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	26,824
11	Enter the amount of line 10 to be Credited to 2018 estimated tax 26,824 Refunded	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a		X
b		X
1b		X
c		X
1c		X
d		
e		
2		X
3		X
4a		X
4b		X
5		X
6	X	
7	X	
8a		
8b	X	
9		X
10		X

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? Website address ▶ N/A	X	
14 The books are in care of ▶ JOSHUA L. MINER P.O. BOX 111 Located at ▶ NORTH ANDOVER MA ZIP+4 ▶ 01845 Telephone no ▶ 978-688-7211		
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? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶		X

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 type="checkbox"/> Yes <input checked="" type="checkbox"/> No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions. Organizations relying on a current notice regarding disaster assistance, check here ▶ N/A		
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? If "Yes," list the years ▶ 20, 20, 20, 20	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
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 ▶ 20, 20, 20, 20		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2017 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2017.)	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

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 **N/A** ☐ **5b**

Organizations relying on a current notice regarding disaster assistance, check here ☐

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? **N/A** ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945–5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** ☒

If "Yes" to 6b, file Form 8870

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? **N/A** **7b**

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. See instructions.**

(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
JOSHUA L. MINER 356 MAIN STREET BOXFORD MA 01921	TRUSTEE 0.00	0	0	0
DEBORAH D. PUTNAM 32 ARBOROUGH ROAD ROSLINDALE MA 02131	TRUSTEE 0.00	0	0	0
CHRISTOPHER W. ROGERS 46 OCEAN STREET NAHANT MA 01908	TRUSTEE 0.00	0	0	0

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	(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

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)***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
BROWN BROTHERS HARRIMAN 40 WATER STREET BOSTON MA 02110	INVESTMENT ADVI	110,992
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 N/A	
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 N/A	
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	22,966,547
b	Average of monthly cash balances	1b	921,649
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	23,888,196
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	23,888,196
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	358,323
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	23,529,873
6	Minimum investment return. Enter 5% of line 5	6	1,176,494

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	1,176,494
2a	Tax on investment income for 2017 from Part VI, line 5	2a	12,948
b	Income tax for 2017 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	12,948
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,163,546
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	1,163,546
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	1,163,546

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	1,406,571
b	Program-related investments – total from Part IX-B	1b	
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) STATEMENT 10	3b	467,083
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	1,873,654
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	12,948
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,860,706

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				1,163,546
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2017				
a From 2012				
b From 2013	138,893			
c From 2014				
d From 2015	248,367			
e From 2016	403,124			
f Total of lines 3a through e	790,384			
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ 1,873,654				
a Applied to 2016, but not more than line 2a				
b Applied to undistributed income of prior years (Election required – see instructions)				
c Treated as distributions out of corpus (Election required – see instructions)				
d Applied to 2017 distributable amount				1,163,546
e Remaining amount distributed out of corpus	710,108			
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	1,500,492			
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount – see instructions				
e Undistributed income for 2016 Subtract line 4a from line 2a Taxable amount – see instructions				
f Undistributed income for 2017 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2018				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)				
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	1,500,492			
10 Analysis of line 9				
a Excess from 2013	138,893			
b Excess from 2014				
c Excess from 2015	248,367			
d Excess from 2016	403,124			
e Excess from 2017	710,108			

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

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

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

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

b 85% of line 2a

c Qualifying distributions from Part XII,
line 4 for each year listed

d Amounts included in line 2c not used directly for active conduct of exempt activities

e Qualifying distributions made directly for active conduct of exempt activities
Subtract line 2d from line 2c

3 Complete 3a, b, or c for the alternative test relied upon

a "Assets" alternative test – enter

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test – enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

c "Support" alternative test – enter

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

(3) Largest amount of support from an exempt organization

(4) Gross investment income

[illegible]

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

1 Information Regarding Foundation Managers:

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

N/A

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

N/A

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

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

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

JOSHUA L. MINER 978-688-7211
P.O. BOX 111 NORTH ANDOVER MA 01845

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

SEE ATTACHED STATEMENT

c Any submission deadlines

SEE ATTACHED STATEMENT

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

SEE ATTACHED STATEMENT

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 Paid during the year SEE ATTACHED SCHEDULE	UNRELATED	501 (C) (3) CHARITABLE	PURPOSE	1,298,421
Total			▶ 3a	1,298,421
b Approved for future payment SEE ATTACHED SCHEDULE	UNRELATED	501 (C) (3) CHARITABLE	PURPOSE	152,083
Total			▶ 3b	152,083

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 11 - Other Income

Description	Revenue per Books	Net Investment Income	Adjusted Net Income
BBH K-1 ST CAPITAL GAIN	\$ 140,146	\$ 140,146	\$
BBH K-1 LT CAPITAL GAIN	202,722	202,722	
CLASS ACTION PROCEEDS	501		
BBH WEALTH STRATEGIES K-1S	12,427		
TOTAL	\$ 355,796	\$ 342,868	\$ 0

Statement 2 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
INVESTMENT EXPENSES	\$ 110,992	\$ 110,992	\$	\$
TOTAL	\$ 110,992	\$ 110,992	\$ 0	\$ 0

Statement 3 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
FEDERAL TAX	\$	\$	\$	\$
STATE FILING FEE	250			
FOREIGN TAX				
BBH K-1S FOREIGN TAX	11,997	11,997		
TOTAL	\$ 12,247	\$ 11,997	\$ 0	\$ 0

Federal Statements

Statement 4 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXPENSES			\$	\$
OFFICE EXPENSE	102,000			102,000
BBH K-1S 2% FLOOR DEDUCTIONS	81,442	81,442		
DUES & SUBSCRIPTIONS	6,150			6,150
TOTAL	\$ 189,592	\$ 81,442	\$ 0	\$ 108,150

Statement 5 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
CORPORATE EQUITIES	\$ 13,744,011	\$ 13,346,413	COST	\$ 18,223,149
TOTAL	\$ 13,744,011	\$ 13,346,413		\$ 18,223,149

Statement 6 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
CORPORATE BONDS	\$ 6,395,640	\$ 6,918,457	COST	\$ 6,849,964
TOTAL	\$ 6,395,640	\$ 6,918,457		\$ 6,849,964

Federal Statements**Statement 7 - Form 990-PF, Part II, Line 15 - Other Assets**

Description	Beginning of Year	End of Year	Fair Market Value
BOND COST BASIS ADJUSTMENT	\$ 1,113	\$	\$
TOTAL	\$ 1,113	\$ 0	\$ 0

Statement 8 - Form 990-PF, Part II, Line 22 - Other Liabilities

Description	Beginning of Year	End of Year
BOND COST BASIS ADJUSTMENT	\$	\$ 1,478
TOTAL	\$ 0	\$ 1,478

Form 990-PF, Part XV, Line 2b - Application Format and Required Contents

Description
SEE ATTACHED STATEMENT

Form 990-PF, Part XV, Line 2c - Submission Deadlines

Description
SEE ATTACHED STATEMENT

Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations

Description
SEE ATTACHED STATEMENT

EIN#: 04-6107991

TAX YEAR: 2017

STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARTABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST

PROJECT #1 – LAWRENCE HEALTH & HUMAN SERVICES HIGH SCHOOL

1. THE NATURE AND PURPOSES OF THE PROJECT FOR WHICH THE AMOUNTS ARE BEING SET ASIDE:

<u>NAME</u>	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
LAWRENCE HEALTH & HUMAN SERVICES HIGH SCHOOL	\$2,083	SCHOOL PROGRAM AT EDGEWOOD FARM IN NORTH ANDOVER
70-71 NORTH PARISH RD		
LAWRENCE, MA 01843		

2. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2018 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.
3. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).
4. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.
5. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

	<u>YEAR</u>	<u>AMOUNT</u>
LAWRENCE HEALTH & HUMAN SERVICES HIGH SCHOOL	2018	\$2,083
	TOTAL	\$2,083

EIN#: 04-6107991

TAX YEAR: 2017

STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARITABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST

PROJECT #2 – GREATER LAWRENCE TECHNICAL SCHOOL

1. THE NATURE AND PURPOSES OF THE PROJECT FOR WHICH THE AMOUNTS ARE BEING SET ASIDE:

<u>NAME</u>	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
GREATER LAWRENCE TECHNICAL SCHOOL	\$150,000	CAPITAL FOR THE SCHOOL'S ATHLETIC FACILITIES RENOVATIONS
57 RIVER ROAD		
ANDOVER, MA 01810		

2. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2018 AND 2019 WHICH ARE PERIODS THAT END NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.
3. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).
4. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.
5. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

<u>NAME</u>	<u>YEAR</u>	<u>AMOUNT</u>
GREATER LAWRENCE TECHNICAL SCHOOL	2018	\$75,000
	2019	75,000
	TOTAL	\$150,000

EIN#: 04-6107991

TAX YEAR: 2017

STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARTABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST

PROJECT #3 – PINGREE SCHOOL PREP@PINGREE

6. THE NATURE AND PURPOSES OF THE PROJECT FOR WHICH THE AMOUNTS ARE BEING SET ASIDE:

<u>NAME</u>	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
PINGREE SCHOOL PREP@PINGREE	\$15,000	OPERATING FUNDING
537 HIGHLAND STREET		
SOUTH HAMILTON, MA 01982		

7. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2018 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.
8. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).
9. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.
10. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

<u>NAME</u>	<u>YEAR</u>	<u>AMOUNT</u>
PINGREE SCHOOL PREP@PINGREE	2016	\$15,000
	2017	15,000
	2018	15,000
	TOTAL	\$45,000

EIN#: 04-6107991

TAX YEAR: 2017

STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARITABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST

PROJECT #4 – LAWRENCE GENERAL HOSPITAL

1. THE NATURE AND PURPOSES OF THE PROJECT FOR WHICH THE AMOUNTS ARE BEING SET ASIDE:

NAME	AMOUNT	PURPOSE OF THE PROJECT
LAWRENCE GENERAL HOSPITAL	\$150,000	NEW SURGICAL CENTER & RENOVATIONS
PO BOX 189		
LAWRENCE, MA 01842		

2. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2018, 2019 AND 2020 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.
3. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).
4. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.
5. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

NAME	YEAR	AMOUNT
LAWRENCE GENERAL HOSPITAL	2016	\$50,000
	2017	50,000
	2018	50,000
	2019	50,000
	2020	50,000
	TOTAL	\$250,000

EIN#: 04-6107991

TAX YEAR: 2017

STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARTABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST

PROJECT #5 – BELLESINI ACADEMY

6. THE NATURE AND PURPOSES OF THE PROJECT FOR WHICH THE AMOUNTS ARE BEING SET ASIDE:

<u>NAME</u>	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
BELLESINI ACADEMY	\$30,000	CAPITAL FUNDING FOR SCHOOL EXPANSION
94 BRADFORD STREET		
LAWRENCE, MA 01840		

7. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2018 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.
8. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).
9. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.
10. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

<u>NAME</u>	<u>YEAR</u>	<u>AMOUNT</u>
BELLESINI ACADEMY	2016	\$35,000
	2017	35,000
	2018	30,000
	TOTAL	\$100,000

EIN#: 04-6107991

TAX YEAR: 2017

STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARITABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST

PROJECT #6 – MERRIMACK VALLEY YMCA – LAWRENCE BRANCH

11. THE NATURE AND PURPOSES OF THE PROJECT FOR WHICH THE AMOUNTS ARE BEING SET ASIDE:

<u>NAME</u>	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
MERRIMACK VALLEY YMCA	\$120,000	LAWRENCE BRANCH CAPITAL
101 AMESBURY STREET 4 TH FLOOR		
LAWRENCE, MA 01840		

12. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2018 AND 2019 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.
13. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).
14. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.
15. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

<u>NAME</u>	<u>YEAR</u>	<u>AMOUNT</u>
MERRIMACK VALLEY YMCA	2016	\$75,000
	2017	55,000
	2018	55,000
	2019	65,000
	TOTAL	\$250,000

ABBOT & DOROTHY H. STEVENS FOUNDATION
 EIN. 04-6107991
 TAX YEAR. 2017
 FORM 990PF
 PART XV 3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT		FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
Boys & Girls Club of Lawrence Markus Fischer, Exec. Director 138 Water Street Lawrence, MA 01841	501(C)(3) Charitable Organization		operating support	25,000.00
Bread & Roses Housing Yasnia GL, EL Dr PO Box 7 Lawrence, MA 01840	501(C)(3) Charitable Organization		purchase property Lawrence & programming support	25,000.00
ECCF Summer in Greater Lawrence Carol Schuster Admin 175 Andover Street - Suite 101 Dorchester, MA 01923	501(C)(3) Charitable Organization		summer 2017	50,000.00
Home Health VNA John Albert, Pres/CEO 380 Merrimack St. Bldg 9 Lawrence, MA 01843	501(C)(3) Charitable Organization		COPD management program - year two	7,500.00
Project Adventure Lynn Childs 710 Cabot Street Beverly, MA 01915	501(C)(3) Charitable Organization		programming support - Lawrence schools	25,000.00
Andover Village Improvement Society PO Box 5097 Andover, MA	501(C)(3) Charitable Organization		Franciscan property purchase, final pay on 20K over 2 yrs 2018/17	10,000.00
Phoenix Charter Academy Beth Anderson, CEO 60 Canal Street, 4th floor Boston, MA 02114	501(C)(3) Charitable Organization		Phoenix Academy Lawrence program support	7,500.00
Self Eastern Boston Melon Davis, President PO Box 301155 Jamaica Plain, MA 02130	501(C)(3) Charitable Organization		MV provider training	5,500.00
Lawrence High Health & Human Svcs 70-71 North Parish Rd Lawrence, MA 01843	501(C)(3) Charitable Organization		transport students to Pfizer for mentoring & tutoring	5,120.00
Andover ABC Susan Connolly, President Post Office Box 212 Andover, MA 01810	501(C)(3) Charitable Organization		general operating & anniversary event support	25,000.00
Merrimack Valley Immigrant Education Ctr Karen Sheridan, Program Director 20 Ballard Road Lawrence, MA 01843	501(C)(3) Charitable Organization		operating & program support	12,000.00
Phillips Academy Beth Parsons, Assoc. Director 180 Main Street Andover, MA 01810	501(C)(3) Charitable Organization		ABL program support	25,000.00
New Profit Inc - Teach for America Joel Bluer, Exec. Director 60 Canal Street, 3rd Fl Boston, MA 02114	501(C)(3) Charitable Organization		Lawrence programming	40,000.00
Thompson Island Outward Bound Arthur Preston, President PO Box 127 Boston, MA 02127	501(C)(3) Charitable Organization		Connections program Boston	15,000.00
Phineas School Prep @ Phineas Steve Fibus, Director P @ P 537 Highland Street South Hamiton, MA 01982	501(C)(3) Charitable Organization		program support	15,000.00
Greeter Lawrence Community Building PO Box 955 Lawrence, MA 01842	501(C)(3) Charitable Organization		2nd pay on 25K over 2 yrs operating support	12,500.00
Appalachian Mountain Club Margaret McManis, Dir of Corp/Found 5 Joy Street Boston, MA 02108	501(C)(3) Charitable Organization		Youth Opportunities program - Lawrence and Lowell	30,000.00

ABBOT & DOROTHY H. STEVENS FOUNDATION
 EIN. 04-6107991
 TAX YEAR. 2017
 FORM 990PF
 PART XV 3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT		FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NAME AND ADDRESS				
Bellesini Academy Julia DiFilippo, Exec. Director 94 Bradford Street Lawrence, MA 01840	501(C)(3) Charitable Organization		general operating support	33,000.00
Catholic Schools Foundation Michael Reardon, Executive Dir. 260 Franklin Street - Ste. 630 Boston, MA 02110	501(C)(3) Charitable Organization		scholarship assistance Lawrence	12,000.00
Essex County Greenbelt Association Ed Becker, Ex. Dir. 82 Eastam Avenue Essex, MA 01929	501(C)(3) Charitable Organization		operating support	7,500.00
Lawrence Family Devel. & Education Fund Ralph Carreno, Exec. Dir. 3 West Street Lawrence, MA 01841	501(C)(3) Charitable Organization		Quintana Center support, 25K, Alternative Youth Center capital support 25K	50,000.00
U Aspire gabriele King Monae, Ex. Dir., 31 St. James St. Suite 520 Boston, MA 02116	501(C)(3) Charitable Organization		services at Greater Lawrence Technical School	5,000.00
Addison Gallery Phillips Academy Andover, MA 01810	501(C)(3) Charitable Organization		Lawrence outreach	20,000.00
Boston Symphony Orchestra Symphony Hall, Attn. Ryan Loney Boston, MA 02115	501(C)(3) Charitable Organization		Lawrence students scholarships - Days in the Arts	8,000.00
Elevated Thought Foundation 22 HeatherOlive Atn. Lester Sydney, Co-Founder Methuen, MA 01844	501(C)(3) Charitable Organization		operating & program support	15,000.00
Jessie Greger Crisis Center Suzanne Dubae, CEO 2 Herman Street Newburyport, MA 01950	501(C)(3) Charitable Organization		operating & program support	7,000.00
Governors Academy Michelle de la Guardia 1 Elm Street Byfield, MA 01922	501(C)(3) Charitable Organization		program support - GovtPLUS	10,000.00
International Institute of New England Jeffrey Thielman, President/CEO 15-17 Warren St., 2nd Floor Lowell, MA 01852	501(C)(3) Charitable Organization		Refugee Employment Services program Lowell	5,000.00
Hennricks Valley YMCA Gary Morell, President 101 Amesbury Street - 4th Fl Lawrence, MA 01840	501(C)(3) Charitable Organization		Educational Initiatives Lawrence branch	35,000.00
NeVist Family of Services Joyce Shannon, CEO 10-12 Ingalls Court Methuen, MA 01844	501(C)(3) Charitable Organization		Renovation - common area 2nd phase	15,000.00
Northstar Independent Living Kevin Ferrel 20 Ballard Road Lawrence, MA 01843	501(C)(3) Charitable Organization		replace wheelchair lift van	13,000.00
Spirit of Adventure Council-Boy Scouts Chuck Easton, CEO 600 West Cummings Park, Suite 2750 Woburn, MA 01810	501(C)(3) Charitable Organization		club scouts program at Lawrence Catholic Academy	6,500.00
Merrimack Valley YMCA Gary Morell, President 101 Amesbury Street - 4th Fl Lawrence, MA 01840	501(C)(3) Charitable Organization		Lawrence branch capital renovations	55,000.00
Lawrence Community Works Jessica Andora 169 Newbury Street Lawrence, MA 01841	501(C)(3) Charitable Organization		final payment on 165K Over 3 yrs-structure Movement Cty & staff	55,000.00

ABBOT & DOROTHY H. STEVENS FOUNDATION

EIN: 04-6107991

TAX YEAR: 2017

FORM 990PF

PART XV 3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS		FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
Lawrence General Hospital William Paulson Dr. of Devel. PO Box 189 Lawrence, MA 01842		501(C)(3) Charitable Organization	2nd payment on 250K over 5 yrs. surgical center & 3D mammo center	50,000.00
Greater Lawrence Family Health Center Bob Ingala Pres/CEO 1 Griffin Drive, Suite 101 Methuen, MA 01844		501(C)(3) Charitable Organization	Mobile unit for homeless healthcare	25,000.00
Boys & Girls Club of Gr. Lowell Joseph Hunkler, Exec. Director 657 Middlesex Street Lowell, MA 01851		501(C)(3) Charitable Organization	Cultural Arts programming	17,500.00
Cambridge College Soniya Espinal Dir. of Inst. Support 1000 Mass Avenue Cambridge, MA 02138		501(C)(3) Charitable Organization	Mentoring program Lawrence campus	7,500.00
Community Group, The Shelli Babson, Executive Director 180 Hampshire Street Lawrence, MA 01840		501(C)(3) Charitable Organization	program at Windrush Farm	7,500.00
Institute for Non-Profit Practices Yolanda Coontin, CEO 144 Gould Street, Ste 205 Needham, MA 02462		501(C)(3) Charitable Organization	Fellowships (4) Lawrence leaders 2017-2018 Core Certificate program	32,800.00
Lowell Community Health Center Susan West Lewis, CEO 181 Jackson Street Lowell, MA 01852		501(C)(3) Charitable Organization	Wraparound Fund support	12,500.00
Merrimack River Watershed Council Robert Russell, Exec. Dir. 80 Island St., Suite 211-E Lawrence, MA 01840		501(C)(3) Charitable Organization	hrs development staff for fundraising & outreach	15,000.00
LCW MA Cases Leadership Inst. Todd Fry MCL Director of Lawrence Community Works 168 Newbury Street Lawrence, MA 01841		501(C)(3) Charitable Organization	Class of 2018 Institute	10,000.00
Squashbusters Greg Zeff, Founder & Ex-Dir. 60 Island Street Lawrence, MA 01840		501(C)(3) Charitable Organization	Operating support Lawrence programming	10,000.00
Jumpstart for Young Children Sarah Badiga, Devel. Manager 308 Congress St. 6th Floor Boston, MA 02210		501(C)(3) Charitable Organization	Lawrence & Lowell programming	7,500.00
Junior Achievement of N. NE Raf Nore, President/CEO 400 Fifth Avenue Suite 300 Waltham, MA 02451		501(C)(3) Charitable Organization	Programming at Lawrence Boys & Girls Club	8,000.00
Museum of Science Amy O'Doherty, Adv. Officer Science Park Boston, MA 02114		501(C)(3) Charitable Organization	Student access scholarships Lawrence & Lowell	7,500.00
Pen Meet Challenge 77 4th Avenue Needham, MA 02464		501(C)(3) Charitable Organization	Chris Rogers match-Rider Sean Wilder	550.00
Boston Children's Museum Carole Chamow, Pres. 308 Congress Street Boston, MA 02210		501(C)(3) Charitable Organization	Lawrence & Lowell admissions	8,000.00
Erindale College Richard Wyle, Pres. 378 Hale Street Beverly, MA 01915		501(C)(3) Charitable Organization	Keys to Degrees	15,000.00
Massachusetts General Hospital Lorraine Fenton, Sen Dir. of Major Gals 125 Nathus Street, Suite 540 Boston, MA 02114-1101		501(C)(3) Charitable Organization	Cambodian refugees PTSD research project	5,000.00

ABBOT & DOROTHY H. STEVENS FOUNDATION
 EIN. 04-6107991
 TAX YEAR. 2017
 FORM 990PF
 PART XV 3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
Notre Dame Cristo Rey High School Sister Marysela Cleather President 303 Haverhill Street Lawrence, MA 01840	501(C)(3) Charitable Organization	work study internships at local non-profits	50,000.00
Old Sturbridge Village James Donahue, Pres/CFO 1 Sturbridge Village Road Sturbridge, MA 01566	501(C)(3) Charitable Organization	Lawrence & Lowell educational outreach/admissions	4,000.00
Plymouth Plantation Jill Tompkins, Intst. Giving Manager PO Box 1620 Plymouth, MA 02362	501(C)(3) Charitable Organization	Lawrence & Lowell admissions & classroom visits	5,000.00
Save the Harbor/Save the Bay 212 Northern Ave #304 Boston, MA 02210	501(C)(3) Charitable Organization	Lawrence outreach	3,000.00
Boston Baroque Miguel Rodriguez, Executive Director 10 Guest Street - Suite 200 Boston, MA 02135	501(C)(3) Charitable Organization	performances at Essex Art Center	8,000.00
E for All 80 Island Street, Suite 109 Attn: Janin Duran Lawrence, MA 01840	501(C)(3) Charitable Organization	E para Todos at Lawrence High School	5,000.00
Lezania House Bridget Shaheen, Executive Director PO Box 408 Lawrence, MA 01842	501(C)(3) Charitable Organization	emergency funding after natural disasters funding shift other donors	50,000.00
New England Aquarium Michelle Robichaud Intst. Giving Officer Central Wharf Boston, MA 02110-3399	501(C)(3) Charitable Organization	Free to Learn program Lawrence & Lowell	10,000.00
Playworks Jon Gay Executive Director 67 Kemble Street, Suite 3 6 Boston, MA 02119	501(C)(3) Charitable Organization	Lawrence programming & its expansion	45,000.00
Presentation of Mary Academy Sister D'Fina Redman 209 Lawrence Street Methuen, MA 01844	501(C)(3) Charitable Organization	2nd payment on 30K over 2 yrs. capital-safety & accessibility upgrades	15,000.00
Belenzi Academy Julie DiFilipo Exec. Director 84 Bradford Street Lawrence, MA 01840	501(C)(3) Charitable Organization	2nd pay on 2016 of 100K over 3 30K bal in 2018 school expansion	35,000.00
Lawrence History Center Susan Gebels, Executive Dir 8 Essex Street Lawrence, MA 01840	501(C)(3) Charitable Organization	general operating support	40,000.00
Memrick Valley Habitat for Humanity 80 Island Street Attn: Randy Larson Exec. Director Lawrence, MA 01840	501(C)(3) Charitable Organization	operating support	30,000.00
Mass Audubon Boston Nature Center 500 Walk Hill Street Malden, MA 02128	501(C)(3) Charitable Organization	general operating support	5,000.00
Gay Lesbian Advocates & Defenders 30 Winter St. - Suite 800 Boston, MA 02108	501(C)(3) Charitable Organization	general operating support	5,000.00
SI Sa Puete Lore Mendez, Director PO Box 53 North Andover, MA 01845	501(C)(3) Charitable Organization	general operating support	5,000.00
Boston Latin Academy Friends of 205 Townsend Street Boston, MA 02125	501(C)(3) Charitable Organization	general operating support	5,000.00

ABBOT & DOROTHY H STEVENS FOUNDATION

EIN: 04-6107991

TAX YEAR: 2017

FORM 990PF

PART XV 3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
Project Hope 550 Dudley Street Roxbury, MA 02119	501(C)(3) Charitable Organization	general operating support	1,500.00
Astin Task Force Against Domestic Violence PO Box 120108 Boston, MA 02112	501(C)(3) Charitable Organization	general operating support	1,000.00
Al Five 5 Reyna Place Melro Park, CA 94025	501(C)(3) Charitable Organization	general operating support	500.00
Louis Brown Institute 15 Christopher St Dorchester, MA 02122	501(C)(3) Charitable Organization	general operating support	500.00
Lake Sunapee Protective Association Post Office 683 Sunapee, NH 03782	501(C)(3) Charitable Organization	general operating support	500.00
Pleasant Bay Community Boating John Dickson, Star Comm Chair PO Box 22 North Chatham, MA 02656	501(C)(3) Charitable Organization	general operating support	5,000.00
Greater Lawrence Community Boating PO Box 955 Lawrence, MA 01842	501(C)(3) Charitable Organization	general operating support	5,000.00
Bowdoin College 4100 College Station Brunswick, ME 04011-8432	501(C)(3) Charitable Organization	Scholarship support	5,000.00
Michael J. Fox Foundation 111 West 33rd St., Fl. 10 New York, NY 10001	501(C)(3) Charitable Organization	general operating support	5,000.00
Boston Children's Museum Carole Charlow, Pres. 308 Congress Street Boston, MA 02210	501(C)(3) Charitable Organization	general operating support	5,000.00
My Life My Choice 988 Commonwealth Avenue Ath. Lea Group Exec Dir Boston, MA 02215	501(C)(3) Charitable Organization	general operating support	1,000.00
Nahant Historical Society 41 Valley Road Nahant, MA 01908	501(C)(3) Charitable Organization	general operating support	100.00
Brash School & University-Quinde 575 Madison Ave., Suite 1008 New York, NY 10022-2511	501(C)(3) Charitable Organization	general operating support	500.00
Nahant Public Library, Friends of Post Office Box 76 Nahant, MA 01908-0076	501(C)(3) Charitable Organization	general operating support	100.00
Swampscott Concert Chorus 77 Main Street Medway, MA 02053	501(C)(3) Charitable Organization	general operating support	250.00
American Cancer Society 30 Spenn Street Framingham, MA 01701	501(C)(3) Charitable Organization	general operating support	100.00
Pine School 34 Sunset Rock Road Andover, MA 01810	501(C)(3) Charitable Organization	general operating support	100.00

ABBOT & DOROTHY H. STEVENS FOUNDATION
 EIN 04-6107991
 TAX YEAR 2017
 FORM 990PF
 PART XV 3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
Friends of Chatham Widenways Post Office Box 472 Chatham, MA 02633-0472	501(C)(3) Charitable Organization	general operating support	100.00
Chatham Conservation Foundation 104 Crowell Road Chatham, MA 02633	501(C)(3) Charitable Organization	general operating support	100.00
Chatham Historical Society Post Office Box 709 Chatham, MA 02633	501(C)(3) Charitable Organization	general operating support	100.00
Trinity Church 208 Claiborn Street Boston, MA 02116-3722	501(C)(3) Charitable Organization	general operating support	250.00
English Speaking Union 144 East 39th St. New York NY 10018	501(C)(3) Charitable Organization	general operating support	250.00
Bowdoin College 4100 College Station Brunswick, ME 04011-6432	501(C)(3) Charitable Organization	general operating support	2 500.00
Seven & Eight Park Street Foundation 8 Park Street Boston MA 02108	501(C)(3) Charitable Organization	general operating support	1,000.00
Boston Children's Museum Carole Charrow Pres. 308 Congress Street Boston, MA 02210	501(C)(3) Charitable Organization	general operating support	2,500.00
Nahant Village Church PO Box 77 Nahant, MA 01908	501(C)(3) Charitable Organization	general operating support	3 000.00
Tabor Academy 88 Spring Street Mendon, MA 02738	501(C)(3) Charitable Organization	general operating support	1,000.00
Pleasant Bay Community Basting John Dickson, Ste Comm Chair PO Box 22 North Chatham, MA 02650	501(C)(3) Charitable Organization	general operating support	1,000.00
Harold & Haydn Society Louise Trachten, Assoc. Dir. Institut GW 300 Massachusetts Ave Boston, MA 02115	501(C)(3) Charitable Organization	general operating support	6 000.00
Regis College Antonette Hays, President 235 Wellesley Street Wellesley, MA 02483	501(C)(3) Charitable Organization	Nursing services at Lawrence Catholic Academy	5 000.00

TOTAL

1,298,421.00

ABBOT & DOROTHY H. STEVENS FOUNDATION
 EIN: 04-6107991
 TAX YEAR: 2017
 FORM 990PF
 PART XV 3b GRANTS AND CONTRIBUTIONS APPROVED FOR FUTURE PAYMENT

RECIPIENT		FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NAME AND ADDRESS				
LAWRENCE HEALTH & HUMAN SERVICES HIGH SCHOOL 70-71 NORTH PARISH RD LAWRENCE, MA 01843		501(C)(3) CHARITABLE ORGANIZATION	SCHOOL PROGRAM AT EDGEWOOD FARM IN NORTH ANDOVER	2,083.00
GREATER LAWRENCE TECHNICAL SCHOOL 57 RIVER ROAD ANDOVER, MA 01810		501(C)(3) CHARITABLE ORGANIZATION	CAPITAL FOR ATHLETIC FACILITIES RENOVATIONS	150,000.00

TOTAL
 152,083.00