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

Return of Private Foundation

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

▶ **Do not enter social security numbers on this form as it may be made public.**
▶ **Information about Form 990-PF and its instructions is at *www.irs.gov/form990pf*.**

OMB No 1545-0052

2017

Open to Public Inspection

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

Name of foundation
STEVENSON FAMILY CHARITABLE TRUST

A Employer identification number
04-6629590

Number and street (or P O box number if mail is not delivered to street address)
31 FAYERWEATHER STREET

Room/suite

B Telephone number (see instructions)
(617) 864-2742

City or town, state or province, country, and ZIP or foreign postal code
CAMBRIDGE, MA 02138

C If exemption application is pending, check here ▶ ☐

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

D 1. Foreign organizations, check here ▶ ☐
2 Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

H Check type of organization ☑ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

I Fair market value of all assets at end of year *(from Part II, col (c), line 16)* ▶$ 4,047,336

J Accounting method ☑ Cash ☐ Accrual ☐ Other (specify) _____
(Part I, column (d) must be on cash basis)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

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)	200,000			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	28,584	28,584		
	4	Dividends and interest from securities	33,757	33,757		
	5a	Gross rents				
	b	Net rental income or (loss) _____				
	6a	Net gain or (loss) from sale of assets not on line 10	367,501			
	b	Gross sales price for all assets on line 6a 425,514				
	7	Capital gain net income (from Part IV, line 2)		367,501		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)	22,640	22,640		
	12	**Total.** Add lines 1 through 11	652,482	452,482		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0	0		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)				
	17	Interest	4,338	4,338		4,338
	18	Taxes (attach schedule) (see instructions)	8,409	8,409		8,409
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	13,300	13,300		13,300
	24	**Total operating and administrative expenses.** Add lines 13 through 23	26,047	26,047		26,047
	25	Contributions, gifts, grants paid	574,813			574,813
	26	**Total expenses and disbursements.** Add lines 24 and 25	600,860	26,047		600,860
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	51,622			
	b	**Net investment income** (if negative, enter -0-)		426,435		
	c	**Adjusted net income**(if negative, enter -0-)				

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	168,691	92,663	92,663
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4 Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U S and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)			
	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)	3,849,382	3,954,673	3,954,673
	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)	4,018,073	4,047,336	4,047,336
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	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	4,018,073	4,047,336	
	28 Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29 Retained earnings, accumulated income, endowment, or other funds	0	0	
	30 **Total net assets or fund balances** (see instructions)	4,018,073	4,047,336	
	31 **Total liabilities and net assets/fund balances** (see instructions)	4,018,073	4,047,336	

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	4,018,073
2	Enter amount from Part I, line 27a	2	51,622
3	Other increases not included in line 2 (itemize) ▶ _____	3	3,242
4	Add lines 1, 2, and 3	4	4,072,937
5	Decreases not included in line 2 (itemize) ▶ _____	5	25,601
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	4,047,336

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	BAUPOST SHORT TERM	P		
b	BAUPOST LONG TERM	P		
c	BAUPOST 1231 GAINS	P		
d	BAUPOST 1256 CONTRACTS	P		
e	BAUPOST 1250 TRADER GAINS	P		

	(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			13,405	-13,405
b	358,946			358,946
c	65,065			65,065
d			44,608	-44,608
e	1,503			1,503

	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				-13,405
b				358,946
c				65,065
d				-44,608
e				1,503

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	367,501
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	826,171	4,156,301	0 198776
2015	990,025	4,463,369	0 221811
2014	1,039,977	5,458,418	0 190527
2013	1,337,905	5,662,457	0 236276
2012	988,795	6,336,270	0 156053

2	**Total** of line 1, column (d)	2	1 003443
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 200689
4	Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	4,009,364
5	Multiply line 4 by line 3	5	804,635
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	4,264
7	Add lines 5 and 6	7	808,899
8	Enter qualifying distributions from Part XII, line 4	8	600,860

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	8,529
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	8,529
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	8,529
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017 — 6a: 7,878		
b	Exempt foreign organizations—tax withheld at source — 6b:		
c	Tax paid with application for extension of time to file (Form 8868) — 6c:		
d	Backup withholding erroneously withheld — 6d: 0		
7	Total credits and payments Add lines 6a through 6d	7	7,878
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8	0
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	651
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	
11	Enter the amount of line 10 to be **Credited to 2018 estimated tax** ▶ **Refunded** ▶	11	

Part VII-A **Statements Regarding Activities**

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?	1b		No
	*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*			
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 ▶ $ 0 **(2)** On foundation managers ▶ $ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities*	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? *If "Yes," attach a conformed copy of the changes*	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? *If "Yes," attach the statement required by General Instruction T*	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? *If "Yes," complete Part II, col (c), and Part XV*	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? *If "No," attach explanation* .	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)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	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?	13	Yes	

Website address ▶ N/A

14 The books are in care of ▶ HOWARD H STEVENSON Telephone no ▶ (617) 864-2742

Located at ▶ 31 FAYERWEATHER STREET CAMBRIDGE MA ZIP+4 ▶ 02138

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 instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶	16		No

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

			Yes	No
	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)			
	(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		
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)?			**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?	☐ 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**	**No**
	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?			**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
HOWARD H STEVENSON 31 FAYERWEATHER STREET CAMBRIDGE, MA 02138	TRUSTEE 0 00	0	0	0
FREDERICKA O STEVENSON 31 FAYERWEATHER STREET CAMBRIDGE, MA 02138	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	Title, and average hours per week (b) devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	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 . . . . . ▶	0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities	1a	3,925,847
b	Average of monthly cash balances	1b	144,573
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	4,070,420
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	4,070,420
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	61,056
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	4,009,364
6	**Minimum investment return.** Enter 5% of line 5	6	200,468

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	200,468
2a	Tax on investment income for 2017 from Part VI, line 5	2a	8,529		
b	Income tax for 2017 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	8,529
3	Distributable amount before adjustments Subtract line 2c from line 1			3	191,939
4	Recoveries of amounts treated as qualifying distributions			4	0
5	Add lines 3 and 4			5	191,939
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	191,939

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	600,860
b	Program-related investments—total from Part IX-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	600,860
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	600,860

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				191,939
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. 684,081				
b From 2013. 1,063,510				
c From 2014. 779,810				
d From 2015. 772,611				
e From 2016. 624,092				
f Total of lines 3a through e.	3,924,104			
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ $ 600,860				
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.				191,939
e Remaining amount distributed out of corpus	408,921			
5 Excess distributions carryover applied to 2017	0			0
(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	4,333,025			
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) . . .	684,081			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	3,648,944			
10 Analysis of line 9				
a Excess from 2013. . . . 1,063,510				
b Excess from 2014. . . . 779,810				
c Excess from 2015. . . . 772,611				
d Excess from 2016. . . . 624,092				
e Excess from 2017. . . . 408,921				

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

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

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

	Tax year	Prior 3 years			(e) Total
	(a) 2017	(b) 2016	(c) 2015	(d) 2014	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . .					
c "Support" alternative test—enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . .					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

HOWARD H STEVENSON

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

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

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

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

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

c Any submission deadlines

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

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year* See Additional Data Table				
Total . . . . . ▶ **3a**				574,813
b *Approved for future payment*				
Total . . . . . ▶ **3b**				0

Part XVI-A Analysis of Income-Producing Activities

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			14	28,584	
4 Dividends and interest from securities. . . .			14	33,757	
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.			17	22,640	
8 Gain or (loss) from sales of assets other than inventory			18	367,501	
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). .		0		452,482	0
13 **Total.** Add line 12, columns (b), (d), and (e).				13	452,482

(See worksheet in line 13 instructions to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)
11B	MISC INCOME USED TO PROVIDE ADDITIONAL GIFTS TO ORGANIZATIONS FOR CHARITABLE PURPOSES

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501 (c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of			
	(1) Cash	1a(1)		No
	(2) Other assets	1a(2)		No
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		No
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		No
	(3) Rental of facilities, equipment, or other assets	1b(3)		No
	(4) Reimbursement arrangements	1b(4)		No
	(5) Loans or loan guarantees	1b(5)		No
	(6) Performance of services or membership or fundraising solicitations	1b(6)		No
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		No

d If the answer to any of the above is "Yes," complete the following schedule Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received

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

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

b If "Yes," complete the following schedule

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

Sign Here

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

******	2018-11-07	******
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

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶ ☐	PTIN
COLLEEN ALLARDALLARD ALLARD CPAS		2018-11-07		P00923486

Firm's name ▶ ALLARD & ALLARD CPA'S — Firm's EIN ▶04-3393531

Firm's address ▶ 450 COTTAGE STREET STE 3 SPRINGFIELD, MA 01104 — Phone no (413) 785-1414

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
AMERICAN REPERTORY THEATER 189 CAMBRIDGE ST CAMBRIDGE, MA 02141	NONE	PUBLIC	CHARITABLE	1,000
AMERICAN REPERTORY THEATER 64 BRATTLE ST CAMBRIDGE, MA 02138	NONE	PUBLIC	CHARITABLE	2,700
ARTWORKS608 PLEASANT ST NEW BEDFORD, MA 02740	NONE	PUBLIC	CHARITABLE	200
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
BART CHARTER PUBLIC SCHOOL 1 COMMERCIAL STREET PO BOX 267 ADAMS, MA 01220	NONE	PUBLIC	CHARITABLE	10,000
BETHEL HISTORICAL SOCIETY 10 BOARD ST BETHEL, ME 04217	NONE	PUBLIC	CHARITABLE	250
BOSTON BALLET19 CLARENDON ST BOSTON, MA 02116	NONE	PUBLIC	CHARITABLE	25,000
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
BOSTON BOOK FESTIVAL 32R ESSEX ST SUITE 5 CAMBRIDGE, MA 02139	NONE	PUBLIC	CHARITABLE	1,000
BOSTON LANDMARKS ORCHESTRA 214 LINCOLN ST 331 BOSTON, MA 02134	NONE	PUBLIC	CHARITABLE	1,000
BOSTON LANDMARKS ORCHESTRA 214 LINCOLN ST 331 BOSTON, MA 02134	NONE	PUBLIC	CHARITABLE	500
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
BOSTON SYMPHONY ORCHESTRA 301 MASSACHUSETTS AVE BOSTON, MA 02115	NONE	PUBLIC	CHARITABLE	3,650
BRIGHAM AND WOMEN'S HOSPITAL 75 FRANCIS ST BOSTON, MA 02115	NONE	PUBLIC	CHARITABLE	1,000
CAMBRIDGE CENTER FOR ADULTS EDUCATION 42 BRATTLE ST PO BOX 9113 CAMBRIDGE, MA 02138	NONE	PUBLIC	CHARITABLE	5,000
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
CAMBRIDGE COMMUNITY FOUNDATION 99 BISHOP ALLEN DR CAMBRIDGE, MA 02139	NONE	PUBLIC	CHARITABLE	1,000
CAMBRIDGE HISTORICAL SOCIETY 159 BRATTLE ST CAMBRIDGE, MA 02138	NONE	PUBLIC	CHARITABLE	145
CAMBRIDGE PUBLIC LIBRARY FOUNDATION 449 BRATTLE ST CAMBRIDGE, MA 02138	NONE	PUBLIC	CHARITABLE	250
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
CHARLES RIVER CONSERVANCY 43 THORNDIKE ST CAMBRIDGE, MA 02141	NONE	PUBLIC	CHARITABLE	250
COMMUNITY FOUNDATION OF SOUTHEASTERN MA 128 UNION ST SUITE 403 NEW BEDFORD, MA 02740	NONE	PUBLIC	CHARITABLE	1,000
CONSUMER REPORTS FOUNDATION 101 TRUMAN AVE YONKERS, NY 10703	NONE	PUBLIC	CHARITABLE	35
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
DANA FARBER CANCER INSTITUTE 450 BROOKLINE PLACE BOSTON, MA 02215	NONE	PUBLIC	CHARITABLE	10,000
DARTMOUTH NATURAL RESOURCES TRUST 318 CHASE RD NORTH DARTMOUTH, MA 02747	NONE	PUBLIC	CHARITABLE	1,250
EMERALD NECKLACE CONSERVANCY 125 THE FENWAY BOSTON, MA 02115	NONE	PUBLIC	CHARITABLE	500
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
ENVIRONMENTAL DEFENSE FUND 257 PARK AVE SOUTH NEW YORK, NY 10010	NONE	PUBLIC	CHARITABLE	500
FACING HISTORY AND OURSELVES 16 HURD ROAD BROOKLINE, MA 02146	NONE	PUBLIC	CHARITABLE	5,000
FAMILIES FIRST9 GALEN ST SUITE 400 WATERTOWN, MA 02472	NONE	PUBLIC	CHARITABLE	250
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
FIDELITY CHARITABLE GIFT FUND 75 STATE ST STE 2500 BOSTON, MA 02109	NONE	PUBLIC	CHARITABLE	6,000
FOCUSED ULTRASOUND FOUNDATION 1230 CEDARS CT CHARLOTTESVILLE, VA 22903	NONE	PUBLIC	CHARITABLE	10,000
FRIENDS OF MT AUBURN CEMETERY 580 MT AUBURN ST CAMBRIDGE, MA 02138	NONE	PUBLIC	CHARITABLE	1,000
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
FROM THE TOP 295 HUNTINGTON AVE SUITE 201 BOSTON, MA 02115	NONE	PUBLIC	EDUCATIONAL	5,000
HARVARD ART MUSEUM32 QUINCY ST CAMBRIDGE, MA 02138	NONE	PUBLIC	CHARITABLE	5,000
HARVARD BUSINESS SCHOOL 280 SOILDERS FIELD RD BOSTON, MA 02163	NONE	PUBLIC	CHARITABLE	1,000
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
HARVARD MAGAZINE7 WARE ST CAMBRIDGE, MA 02138	NONE	PUBLIC	CHARITABLE	50
HARVARD SCHOOL OF PUBLIC HEALTH 677 HUNTINGTON AVE BOSTON, MA 02115	NONE	PUBLIC	CHARITABLE	10,000
HARVARD UNIVERSITY 124 MT AUBURN ST CAMBRIDGE, MA 02138	NONE	PUBLIC	CHARITABLE	10,000
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
HISTORIC NEW ENGLAND 141 CAMBRIDGE ST BOSTON, MA 02114	NONE	PUBLIC	CHARITABLE	100
HORIZONS FROM HOMELESS CHILDREN 1705 COLUMBUS AVE ROXBURY, MA 02119	NONE	PUBLIC	CHARITABLE	100
INSTITUTE OF CONTEMPORARY ARTBOSTON 25 HARBOR SHORE DRIVE BOSTON, MA 02210	NONE	PUBLIC	CHARITABLE	5,000
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
ISABELLA STEWART GARDNER MUSEUM 25 EVANS WAY BOSTON, MA 02115	NONE	PUBLIC	CHARITABLE	1,000
ISABELLA STEWART GARDNER MUSEUM 25 EVANS WAY BOSTON, MA 02115	NONE	PUBLIC	CHARITABLE	25,000
ISABELLA STEWART GARDNER MUSEUM 25 EVANS WAY BOSTON, MA 02115	NONE	PUBLIC	CHARITABLE	25,000
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
JUSTINE LEE MIFF FUND FOR EMERALD NECKLACE 125 THE FENWAY BOSTON, MA 02215	NONE	PUBLIC	CHARITABLE	575
KIPP MASSACHUSETS90 HIGH ROCK ST LYNN, MA 01902	NONE	PUBLIC	CHARITABLE	500
LLOYD CENTER FOR THE ENVIRONMENT 430 POTOMSKA RD SOUTH DARTMOUTH, MA 02748	NONE	PUBLIC	CHARITABLE	500
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
LLOYD CENTER FOR THE ENVIRONMENT 430 POTOMSKA RD SOUTH DARTMOUTH, MA 02748	NONE	PUBLIC	CHARITABLE	5,000
MAHOOSUC LAND TRUST162 N RD BETHEL, ME 04217	NONE	PUBLIC	CHARITABLE	250
MAINE MARITIME MUSEUM 243 WASHINGTON ST BATH, ME 04530	NONE	PUBLIC	CHARITABLE	150
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
MASS AUDUBON SOCIETY 208 S GREAT RD LINCOLN, MA 01773	NONE	PUBLIC	CHARITABLE	250
MAX WARBUG COURAGE CURRICULUM 263 HUNTINGTON AVE BOX 366 BOSTON, MA 02115	NONE	PUBLIC	CHARITABLE	1,215
MAX WARBUG COURAGE CURRICULUM 263 HUNTINGTON AVE BOX 366 BOSTON, MA 02115	NONE	PUBLIC	CHARITABLE	1,000
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
MFA465 HUNTINGTON AVE BOSTON, MA 02115	NONE	PUBLIC	CHARITABLE	2,280
MOUNT AUBURN HOSPITAL 330 MOUNT AUBURN STREET CAMBRIDGE, MA 02138	NONE	PUBLIC	CHARITABLE	10,000
MOUNT AUBURN HOSPITAL AUXILIARY 330 MOUNT AUBURN STREET CAMBRIDGE, MA 02138	NONE	PUBLIC	CHARITABLE	50
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
MUSEUM OF SCIENCE1 SCIENCE PARK BOSTON, MA 02114	NONE	PUBLIC	CHARITABLE	438
MUSEUM OF SCIENCE1 SCIENCE PARK BOSTON, MA 02114	NONE	PUBLIC	CHARITABLE	20,000
MUSEUM OF SCIENCE1 SCIENCE PARK BOSTON, MA 02114	NONE	PUBLIC	CHARITABLE	25,000
Total . . . . . ▶ **3a**				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
NATIONAL ALOPECIA AREATA FOUNDATION 65 MITCHELL BLVD SUITE 200B SAN RAFAEL, CA 94903	NONE	PUBLIC	CHARITABLE	100
NATIONAL GEOGRAPHIC SOCIETY 114 17TH ST NW WASHINGTON, DC 20036	NONE	PUBLIC	CHARITABLE	100
NATIONAL TRUST FOR HISTORIC PRESERVATION 2600 VIRGINIA AVE NW 1100 WASHINGTON, DC 20037	NONE	PUBLIC	CHARITABLE	50
Total . . . . . ▶ **3a**				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
NATURAL RESOURCE COUNCIL OF MAINE 3 WADE ST AUGUSTA, ME 04330	NONE	PUBLIC	CHARITABLE	500
NATURAL RESOURCE DEFENSE COUNCIL 40 WEST 20TH ST NEW YORK, NY 10011	NONE	PUBLIC	CHARITABLE	1,000
NATURAL RESOURCES COUNCIL OF MAINE 3 WADE ST AUGUSTA, ME 04330	NONE	PUBLIC	CHARITABLE	500
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
NEW BEDFORD AQUARIUM 1 CENTRAL WHARF BOSTON, MA 02110	NONE	PUBLIC	CHARITABLE	500
NEW BEDFORD WHALING MUSEUM 18 JOHNNY CAKE HILL NEW BEDFORD, MA 02740	NONE	PUBLIC	CHARITABLE	1,000
NEW ENGLAND FORESTRY FOUNDATION 32 FOSTER ST LITTLETON, MA 01701	NONE	PUBLIC	CHARITABLE	100
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
NEW ENGLAND WILD FLOWER SOCIETY 180 HEMENWAY RD FRAMINGHAM, MA 01701	NONE	PUBLIC	CHARITABLE	115
NPR FOUNDATION 1111 N CAPITOL ST NE WASHINGTON, DC 20002	NONE	PUBLIC	CHARITABLE	10,000
OLIN COLLEGE1000 OLIN WAY NEEDHAM, MA 02492	NONE	PUBLIC	CHARITABLE	25,000
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
OLYMPUS HIGH SCHOOLS 2300 E HOLLADAY, UT 84124	NONE	PUBLIC	CHARITABLE	5,000
OUR SISTERS SHCOOL 145 BROWNELL AVE NEW BEDFORD, MA 02740	NONE	PUBLIC	CHARITABLE	1,000
PARTNERS IN HEALTH 800 BOYLSTON ST SUITE 300 BOSTON, MA 02199	NONE	PUBLIC	CHARITABLE	1,000
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
PINE COBBLE SCHOOLL163 GALE RD WILLIAMSTOWN, MA 01267	NONE	PUBLIC	CHARITABLE	1,000
PIONEER INSTITUTE 185 DEVONSHIRE ST BOSTON, MA 02110	NONE	PUBLIC	CHARITABLE	1,000
PLANNED PARENTHOOD LEAGUE OF MASS 1055 COMMONWEALTH AVE BOSTON, MA 02115	NONE	PUBLIC	CHARITABLE	2,500
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
PROJECT BREAD145 BORDER ST BOSTON, MA 02128	NONE	PUBLIC	CHARITABLE	100
RALPH LOWELL SOCIETY 1 GUEST STREET BOSTON, MA 02135	NONE	PUBLIC	CHARITABLE	2,500
RHODE ISLAND PBS50 PARK LANE PROVIDENCE, RI 02907	NONE	PUBLIC	CHARITABLE	150
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
RURAL LAND FOUNDATION 16 LINCOLN RD LINCOLN, MA 01773	NONE	PUBLIC	CHARITABLE	10,000
THE SALVATION ARMYPO BOX 55876 BOSTON, MA 02205	NONE	PUBLIC	CHARITABLE	250
SMITHSONIAN ASTROPHYSICAL OBSERVATORY 60 GARDEN ST CAMBRIDGE, MA 02138	NONE	PUBLIC	CHARITABLE	10,000
Total 3a			▶	574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
SMITHSONIAN INSTITUTE 600 MARYLAND AVE SW WASHINGTON, DC 20002	NONE	PUBLIC	CHARITABLE	50,000
SMITHSONIAN SCIENCE AND EDUCATION CENTER 901 D ST SW 704B WASHINGTON, DC 20024	NONE	PUBLIC	CHARITABLE	10,000
SOUTHCOAST HEALTH SYSTEM PO BOX 3000 NEW BEDFORD, MA 027419919	NONE	PUBLIC	CHARITABLE	100
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
STANFORD UNIVERSITY 326 GALVEZ STREET STANFORD, CA 94305	NONE	PUBLIC	CHARITABLE	10,000
SUDBURY VALLEY TRUSTEES 18 WOLBACH RD SUDBURY, MA 01776	NONE	PUBLIC	CHARITABLE	10,000
SUMMER SEARCH BOSTON 3840 WASHINGTON ST SUITE 2 JAMAICA PLAIN, MA 02130	NONE	PUBLIC	CHARITABLE	28,000
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
TEAM SAMANTHA77 4TH AVE NEEDHAM, MA 02494	NONE	PUBLIC	CHARITABLE	1,000
THE ART CONNECTION551 TREMONT ST BOSTON, MA 02116	NONE	PUBLIC	CHARITABLE	1,000
THE BOSTON FOUNDATION 75 ARLINGTON ST 1000 BOSTON, MA 02116	NONE	PUBLIC	CHARITABLE	5,000
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
THE GUIDANCE CENTER INC 5 SACRAMENTO ST CAMBRIDGE, MA 02138	NONE	PUBLIC	CHARITABLE	1,000
THE NATURE CONSERVANCY 14 MIANE ST 401 BRUNSWICK, ME 04011	NONE	PUBLIC	CHARITABLE	10,000
THE TRUSTEES OF RESERVATIONS 200 HIGH ST BOSTON, MA 02110	NONE	PUBLIC	CHARITABLE	2,500
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
THE WILDERNESS SOCIETY PO BOX 97231 WASHINGTON, DC 20077	NONE	PUBLIC	CHARITABLE	1,050
THURSDAY MORNING TALK 330 MOUNT AUBURN STREET CAMBRIDGE, MA 02138	NONE	PUBLIC	CHARITABLE	450
UMASS DARTMOUTH 285 OLD WESTPORT RD NORTH DARTMOUTH, MA 02747	NONE	PUBLIC	CHARITABLE	1,000
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
UPSTREAM1630 SAN PABLO AVE 400 OAKLAND, CA 94612	NONE	PUBLIC	CHARITABLE	50,000
VNA CARE HOSPICECAMBRIDGE 65 CHILTON STREET CAMBRIDGE, MA 02138	NONE	PUBLIC	CHARITABLE	250
WBUR890 COMMONWEALTH AVE BOSTON, MA 02215	NONE	PUBLIC	CHARITABLE	74,460
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
WESTPORT RIVER WATERSHED ALLIANCE 493 OLD COUNTRY RD WESTPORT, MA 02790	NONE	PUBLIC	CHARITABLE	250
WINSOR MUSIC312 WALTHAM ST LEXINGTON, MA 02421	NONE	PUBLIC	CHARITABLE	100
WORLD WILDLIFE FUND 1250 TWENTY-FOURTH ST NW WASHINGTON, DC 20037	NONE	PUBLIC	CHARITABLE	250
Total . . . . . ▶ 3a				574,813

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
YEARUP BOSTON45 MILK ST BOSTON, MA 02109	NONE	PUBLIC	CHARITABLE	1,000
YOUTH DESIGN48 RUTLAND ST BOSTON, MA 02118	NONE	PUBLIC	CHARITABLE	1,000
Total . . . . . ▶ 3a				574,813

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491311008968

TY 2017 Investments - Other Schedule

Name: STEVENSON FAMILY CHARITABLE TRUST

EIN: 04-6629590

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
BAUPOST LTD PRT - 1983 C-1	AT COST	3,954,673	3,954,673

TY 2017 Other Decreases Schedule

Name: STEVENSON FAMILY CHARITABLE TRUST

EIN: 04-6629590

Description	Amount
BASIS ADJUSTMENT DECREASE IN PTSHIP INTEREST DUE TO FRENCH TAX MATTER	11,076
NONDEDUCTIBLE EXPENSES	1,225
NONDEDUCTIBLE EXPENSES (BAUPOST K-1)	13,300

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TY 2017 Other Expenses Schedule

Name: STEVENSON FAMILY CHARITABLE TRUST

EIN: 04-6629590

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BAUPOST 1983 C-1 EXPENSES	13,300	13,300		13,300

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491311008968

TY 2017 Other Income Schedule

Name: STEVENSON FAMILY CHARITABLE TRUST

EIN: 04-6629590

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
BAUPOST LTD PTSH 1983 C-1	20,801	20,801	20,801
BAUPOST PTSH INCOME	1,839	1,839	1,839

TY 2017 Other Increases Schedule

Name: STEVENSON FAMILY CHARITABLE TRUST

EIN: 04-6629590

Description	Amount
BAUPOST TAX EXEMPT INTEREST	3,242

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TY 2017 Taxes Schedule

Name: STEVENSON FAMILY CHARITABLE TRUST

EIN: 04-6629590

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES ACCRUED	5,630	5,630		5,630
STATE TAXES WITHHELD	2,779	2,779		2,779

efile GRAPHIC print - DO NOT PROCESS | As Filed Data - | DLN: 93491311008968

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
STEVENSON FAMILY CHARITABLE TRUST

Employer identification number
04-6629590

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 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc , purposes, but no such contributions totaled more than $1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions totaling $5,000 or more during the year . . . . . ▶ $ _____

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

Name of organization	Employer identification number
STEVENSON FAMILY CHARITABLE TRUST	04-6629590

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	HOWARD H STEVENSON 31 FAYERWEATHER STREET CAMBRIDGE, MA02138	$ 200,000	☑ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions)

Name of organization
STEVENSON FAMILY CHARITABLE TRUST

Employer identification number
04-6629590

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
		$	
(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
		$	
(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
		$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

Name of organization
STEVENSON FAMILY CHARITABLE TRUST

Employer identification number
04-6629590

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

(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