CA SCANINED AUG 3 2 2018

Form **990-PF** Department of the Treasury EXTENDED TO NOVEMBER 15, 2018

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.

Go to www.irs.gov/Form990PF for instructions and the latest information.

Internal Revenue Service	s.gov/Forme90PF for instri	ucuons and the latest into	illauon.	Open to Public Inspection
For calendar year 2017 or tax year beginning		, and ending		
Name of foundation	-		A Employer identification	n number
FLORENCE & RICHARD KOPLOW F	AMILY			
FOUNDATION C/O FLORENCE KOR	LOW, TRUSTEE		04-686277	5
Number and street (or P O box number if mail is not delivered to street ac	idress)	Room/suite	B Telephone number	
#115 405 WALTHAM STREET			(781)674-	2360
City or town, state or province, country, and ZIP or foreign po	ostal code		C If exemption application is	pending, check here
LEXINGTON, MA 02421-7934				
G Check all that apply: Initial return	Initial return of a fo	ormer public charity	D 1. Foreign organizatio	ns, check here
Final return	Amended return		2 Faraire er constations s	neeting the 8594 test
Address change	X Name change		Foreign organizations recheck here and attach.	computation
H Check type of organization: X Section 501(c)(3) ex	empt private foundation	utuan 👂 🔑	E If private foundation s	tatus was terminated
Section 4947(a)(1) nonexempt charitable trust	Other taxable private founda	tion	under section 507(b)(	1)(A), check here
Fair market value of all assets at end of year J Accounting	ng method: X Cash	Accrual '	F If the foundation is in	a 60-month termination
· · · · · · · · · · · · · · · · · · ·	her (specify)		under section 507(b)(	1)(B), check here
▶\$ 6,924,066. (Part I, colum	nn (d) must be on cash basi	s.)		
Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not	(a) Revenue and	(b) Net investment	(c) Adjusted net	(0) Disbursements for charitable purposes
necessarily equal the amounts in column (a) )	expenses per books	income	income	(cash basis only)
1 Contributions, gifts, grants, etc., received			N/A	
2 Check X If the foundation is not required to attach Sch. B				
3 cash investments		455 055		G = 1 = 1
4 Dividends and interest from securities	157,255.	157,255.		STATEMENT 1
5a Gross rents				
Net rental income or (loss)				
68 Net gain or (loss) from sale of assets not on line 10	<29,394.>		-	
b Gross sales price for all 1,281,720.				
b Gross sales price for all 1,281,720.  7 Capital gain net income (from Part IV, line 2)		0.		
8 Net short-term capital gain				
9 Income modifications Gross sales less returns				
10a and allowances				<u> </u>
b Less Cost of goods sold				-
c Gross profit or (loss)	25	25	<u></u>	STATEMENT 2
11 Other income	25.	25. 157,280.	<u> </u>	STATEMENT Z
12 Total. Add lines 1 through 11	127,886.	157,200.	-	0.
13 Compensation of officers, directors, trustees, etc	0.	0.	ļ <u> </u>	
14 Other employee salaries and wages			ļ. <del>.</del>	
15 Pension plans, employee benefits			<del> </del>	<del></del>
9 16a Legal fees	6 740	CEIVE 0,7,48.		0.•
b Accounting fees STMT 3	20'5112	29, 112.		0.
c Other professional fees STMT 4	29 월 12 			<u> </u>
9 17 Interest		4,528		0.
18 Taxes STMT 5	11,289.	4,520		-
19 Depreciation and depletion				
17 Interest 18 Taxes STMT 5 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings			<del> </del>	
_1			<del></del>	
22 Printing and publications	2 000	2,099.	+	0.
23 Other expenses STMT 6	2,099.	4,099	·	<del></del>
24 Total operating and administrative expenses. Add lines 13 through 23	49,248.	42,487		0.
	296,940.	44,407	<del>`</del>	296,940.
29 Continuations, girts, grants paid	430,340.	<del> </del>	+	2,0,,,=0.
26 Total expenses and disbursements.	346,188.	42,487		296,940.
Add lines 24 and 25	340,100.	42,407	<del>'</del>	250,540.
27 Subtract line 26 from line 12:	<218,302.>	!	1	
8. Excess of revenue over expenses and disbursements	\410,304.>	114,793		
b Net investment income (if negative, enter -0-)	-	114,195	N/A	
C Adjusted net income (if negative, enter -0-)	l	L	1 -4/44	Form <b>990-PF</b> (2017

723501 01-03-18 LHA For Paperwork Reduction Act Notice, see instructions.

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<del></del>			Passanas at year		1 Tago 2
P	art	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year (a) Book Value	(b) Book Value	(c) Fair Market Value
_	1	Cash - non-interest-bearing	(4) 55011 1415	(5) 20011 14.300	(v) · air illiarior · airo
	1	Savings and temporary cash investments	482,858.	225,884.	225,884.
		Accounts receivable	202,0001		
	•	Less; allowance for doubtful accounts			
	4	Pledges receivable		- <del></del>	
	ĺ <i>'</i>	Less: allowance for doubtful accounts			
	5	Grants receivable			
		Receivables due from officers, directors, trustees, and other			
		disqualified persons	{	[	
	7	Other notes and loans receivable			
	i	Less: allowance for doubtful accounts		-	=
Ø	8	Inventories for sale or use			
Assets	9	Prepaid expenses and deferred charges			
As	10a	Investments - U.S. and state government obligations			
!	Ь	Investments - corporate stock			<u> </u>
	c	Investments - corporate bonds			
	11	Investments - land, buildings, and equipment basis			
		Less accumulated depreciation			
	12	Investments - mortgage loans			
	13	Investments - other STMT 7	5,489,716.	5,348,685.	6,476,202.
	14	Land, buildings, and equipment basis			
	ļ	Less accumulated depreciation	4 0 4 17	104 021	001 000
	ı	Other assets (describe	4,047.	184,231.	221,980.
	16	Total assets (to be completed by all filers - see the	E 076 601	E 750 000	6 024 066
_	17	instructions. Also, see page 1, item I)	5,976,621.	5,758,800.	6,924,066.
	l	Accounts payable and accrued expenses			
	18 19	Grants payable Deferred revenue			
ties	20	Loans from officers, directors, trustees, and other disqualified persons			
iabilitie	l	Mortgages and other notes payable			
Ξ.		Other liabilities (describe FOREIGN TAX PAYABL)	4,047.	4,528.	(
	23	Total liabilities (add lines 17 through 22)	4,047.	4,528.	,
`		Foundations that follow SFAS 117, check here	,		ĺ
		and complete lines 24 through 26, and lines 30 and 31.			
es	24	Unrestricted			1
anc	25	Temporarily restricted			,
Ba	26	Permanently restricted			
or Fund Bala		Foundations that do not follow SFAS 117, check here			
Ę		and complete lines 27 through 31.			į
	27	Capital stock, trust principal, or current funds	3,625,000.	3,625,000.	
Assets	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	į .
	29	Retained earnings, accumulated income, endowment, or other funds	2,347,574.	2,129,272.	!
Set	30	Total net assets or fund balances	5,972,574.	5,754,272.	
	2.1	Takel liebilisies and not access the delegate	5,976,621.	5,758,800.	
=	31	Total liabilities and net assets/fund balances		3,730,000.	
LP	art	Analysis of Changes in Net Assets or Fund Ba	lances		
1	Tota	net assets or fund balances at beginning of year - Part II, column (a), line	30		
		st agree with end-of-year figure reported on prior year's return)		1	5,972,574.
2	Ente	r amount from Part I, line 27a		2	5,972,574. <218,302.>
3	Othe	r increases not included in line 2 (itemize)		3	0.
		lines 1, 2, and 3		4	5,754,272.
		eases not included in line 2 (itemize)		5	0.
6	Tota	net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	olumn (b), line 30	6	5,754,272.
					Form <b>990-PF</b> (2017)

Form 990-PF (2017) FOUNDATION C/O FLORENCE KOPLOW, TRUSTEE 04-6862775 Page 3 Rantily Capital Gains and Losses for Tax on Investment Income (b) How acquired P - Purchase D - Donation (a) List and describe the kind(s) of property sold (for example, real estate, (c) Date acquired (d) Date sold (mo., day, yr.) (mo., day, yr.) 2-story brick warehouse; or common stock, 200 shs. MLC Co.) 1a CHARLES SCHWAB 0948 12/31/17 P b CHARLES SCHWAB 0948 12/31/17 P P 12/31/17 c CAPITAL GAIN DISTRIBUTION d FROM K-1: BROOKFIELD INFRASTRUCTURE e PARTNERS, LP P 12/31/17 (g) Cost or other basis (f) Depreciation allowed (h) Gain or (loss) (e) Gross sales price (or allowable) plus expense of sale ((e) plus (f) minus (g)) 296,301 293,156. 3,145. 975,896. 1,017,950. <42,054.> h 9,523. 9,523. d 8. <8.> е 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 (k) Excess of col. (i) (i) Adjusted basis Losses (from col. (h)) (i) FMV as of 12/31/69 as of 12/31/69 over col. (j), if any 3,145. <42,054.> b 9,523. d <8.> If gain, also enter in Part I, line 7 <29,394.> 2 Capital gain net income or (net capital loss) If (loss), enter -0- in Part I, line 7 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 N/A Rartiva 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. Yes X No Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part. 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) (d)
Distribution ratio
(col. (b) divided by col. (c)) (b) (c) Adjusted qualifying distributions Net value of noncharitable-use assets 311,922 6,077,080. .051328 2016 323,802. 6,419,540. .050440 2015 6,719,676. .045294 304,359. 2014 290,792. 6,472,452. .044928 2013 308,299. 2012 6,040,340. .051040 2 Total of line 1, column (d) 2 .243030 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 .048606 the foundation has been in existence if less than 5 years 3 6,437,258. Enter the net value of noncharitable-use assets for 2017 from Part X, line 5 4 312<u>,889.</u> 5 Multiply line 4 by line 3 5 6 Enter 1% of net investment income (1% of Part I, line 27b) 6 1,148. 314,037. 7 Add lines 5 and 6 7

296,940.

8 Enter qualifying distributions from Part XII, line 4

See the Part VI instructions.

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.

FLORENCE & RICHARD KOPLOW FAMILY 04-6862775 Form 990-PF (2017) FOUNDATION C/O FLORENCE KOPLOW, TRUSTEE Page 4 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. \_\_ (attach copy of letter if necessary-see instructions) Date of ruling or determination letter: 2,296. b Domestic foundations that meet the section 4940(e) requirements in Part V, check here 🕨 🔲 and enter 1% 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-) 3 Add lines 1 and 2 4 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-5 6 Credits/Payments: 6,800 a 2017 estimated tax payments and 2016 overpayment credited to 2017 0. b Exempt foreign organizations - tax withheld at source 6b Ō. c Tax paid with application for extension of time to file (Form 8868) 6с n. d Backup withholding erroneously withheld 6.800. 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here 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 4,504. 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 4,504 . Refunded 11 Enter the amount of line 10 to be: Credited to 2018 estimated tax 11 0. Part VII-A | Statements Regarding Activities 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 X any political campaign? 1a **b** Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition X 16 If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities. X c Did the foundation file Form 1120-POL for this year? 1c d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: 0 . (2) On foundation managers. ▶ \$ (1) On the foundation. > \$ e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ 0. X 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? 2 If "Yes," attach a detailed description of the activities. 3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes X 49 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? N/A b If "Yes," has it filed a tax return on Form 990-T for this year?  $\bar{\mathbf{x}}$ 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 5 If "Yes," attach the statement required by General Instruction T 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 X 7 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 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 Go If "No," attach explanation 8b 9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar

year 2017 or the tax year beginning in 2017? See the instructions for Part XIV. If "Yes," complete Part XIV

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

V

Form 990-PF (2017)

Form 990-PF (2017) FOUNDATION C/O FLORENCE KOPLOW, TRUSTEE

Part VII-A | Statements Regarding Activities (continued)

04-6862775

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(continued)		Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of	<b>├</b> ─		
section 512(b)(13)? If "Yes," attach schedule. See instructions	11	)	x
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges		1	<del></del> -
If "Yes," attach statement. See instructions	12	1	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	<del></del> -
Website address ► N/A		1 1	
14 The books are in care of ► FLORENCE KOPLOW  Telephone no. ► 78	1-674-2	360	
	▶02421		34
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here	<u></u>		
and enter the amount of tax-exempt interest received or accrued during the year	ı	I/A	
16 At any time during calendar year 2017, did the foundation have an interest in or a signature or other authority over a bank,		Yes	No
securities, or other financial account in a foreign country?	16		X
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the	<u> </u>		
foreign country	}		
Part VII-B   Statements Regarding Activities for Which Form 4720 May Be Required			
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
1a During the year, did the foundation (either directly or indirectly):			
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)		1 '	,
a disqualified person?	No	i '	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	No	l j	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	] No		ì
(5) Transfer any income or assets to a disqualified person (or make any of either available	1	}	
for the benefit or use of a disqualified person)?	No		] .
(6) Agree to pay money or property to a government official? (Exception. Check "No"		1	
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.)	. No		i
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	/A <u>1b</u>	<u> </u>	<u> </u>
Organizations relying on a current notice regarding disaster assistance, check here	· 🗀	1	1
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		J	
before the first day of the tax year beginning in 2017?	<u>1c</u>	<u> </u>	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation		1	ŀ
defined in section 4942(j)(3) or 4942(j)(5)):	ļ	į .	1
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	_	1	ľ
before 2017?	No		1
If "Yes," list the years 🕨,,,	1	1	ł
b Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect	-	1	
valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach			
•	I/A <u>2b</u>	<del> </del>	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	1	1	
• • • • • • • • • • • • • • • • • • •	1	1	
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time	77	ì	
during the year?	<u>~</u> 00	1	
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	}	1	
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,	7/A  - 3b		
•		+-	X
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  • Did the foundation make any processor to a prior year (but offer December 21, 1960) that could report to a pay the best between the country of the foundation make any processor to a prior year (but offer December 21, 1960) that could report to a pay the best between the country of the foundation investigation and the prior year (but offer December 21, 1960) that could report to the pay the prior year (but offer December 21, 1960) that could report to the pay the pay that the pay the	48	+-	+^
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
had not been removed from jeopardy delote the first day of the tax year beginning in 2017.	4b Form 99	On DE	

FLORENCE & RICHARD KOPLOW FAMILY Form 990-PF (2017) FOUNDATION C/O FLORENCE KOPLOW, TRUSTEE 04-6862775 Page 6 Part VII-B | Statements Regarding Activities for Which Form 4720 May Be Required (continued) Yes No 5a During the year, did the foundation pay or incur any amount to: Yes X No (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly. Yes X No any voter registration drive? Yes X No (3) Provide a grant to an individual for travel, study, or other similar purposes? (4) Provide a grant to an organization other than a charitable, etc., organization described in section Yes X No 4945(d)(4)(A)? See instructions (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for \_ Yes X No the prevention of cruelty to children or animals? b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations N/A 5b section 53.4945 or in a current notice regarding disaster assistance? See instructions 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 Yes No N/A expenditure responsibility for the grant? 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 Yes X No a personal benefit contract?  $\bar{\mathbf{x}}$ 6b b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870. Yes X No 7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? 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. (d) Contributions to employee benefit plans and deterred compensation (b) Title, and average hours per week devoted to position (c) Compensation (e) Expense account, other (If not paid, enter -0-) (a) Name and address allowances FLORENCE KOPLOW, TRUSTEE TRUSTEE #115 405 WALTHAM STREET LEXINGTON, MA 024217934 0.50 0. 0. 0. 2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE." (d) Contributions to employee benefit plans and deferred compensation (e) Expense account, other allowances (b) Title, and average hours per week devoted to position (c) Compensation (a) Name and address of each employee paid more than \$50,000 NONE

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

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)		
3 Five highest-paid independent contractors for professional services. If none, enter "NONE."		
(a) Name and address of each person paid more than \$50,000 (b) Type of service		(c) Compensation
NONE		
	- 1	
	<del></del>	<del></del>
Total number of others receiving over \$50,000 for professional services  Part IX-A   Summary of Direct Charitable Activities	<u> </u>	0
<del></del>		
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.	1	Expenses
1 N/A		
1		
2		
~		
3		
4		
Dark IV D I a		
Part IX-B   Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.		Amount
1 N/A		
0		
	ı	
	ì	
All other program-related investments. See instructions.		
3	į	
	l	
	İ	
Total, Add lines 1 through 3		0.
<del></del>	For	m 990-PF (2017)

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.) Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: 6,276,582. a Average monthly fair market value of securities 1a 258,705. b Average of monthly cash balances 16 c Fair market value of all other assets 1c 6,535,287. 1d d Total (add lines 1a, b, and c) e Reduction claimed for blockage or other factors reported on lines 1a and 0. 1c (attach detailed explanation) 2 Acquisition indebtedness applicable to line 1 assets 3 98,029 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) 4 6,437,258. Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 5 321,863. Minimum investment return. Enter 5% of line 5 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.) 321,863. Minimum investment return from Part X, line 6 1 Tax on investment income for 2017 from Part VI, line 5 Income tax for 2017. (This does not include the tax from Part VI.) 2,296. c Add lines 2a and 2b 2c Distributable amount before adjustments. Subtract line 2c from line 1 3 4 Recoveries of amounts treated as qualifying distributions 567. 5 Add lines 3 and 4 0. Deduction from distributable amount (see instructions) 6 567. Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 Part XII Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: 296,940. a Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 1a 1b b Program-related investments - total from Part IX-B Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes 2 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 296,940. Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4 4 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b Adjusted qualifying distributions. Subtract line 5 from line 4 6 Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Form 990-PF (2017)

Part XIII Undistributed Income (see instructions)

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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  9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a  0 Analysis of line 9: a Excess from 2013 b Excess from 2014 c Excess from 2015 d Excess from 2016	lines 4d and 5 from line 1. This amount must			]	
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  9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a  0 Analysis of line 9: a Excess from 2013 b Excess from 2014 c Excess from 2015 d Excess from 2016	be distributed in 2018				319,400.
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  9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a  0 Analysis of line 9: a Excess from 2013 b Excess from 2014 c Excess from 2015 d Excess from 2016	7 Amounts treated as distributions out of				,
may be required - see instructions)  8 Excess distributions carryover from 2012 not applied on line 5 or line 7  9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a  0 Analysis of line 9: a Excess from 2013 b Excess from 2014 c Excess from 2015 d Excess from 2016	corpus to satisfy requirements imposed by				
8 Excess distributions carryover from 2012 not applied on line 5 or line 7  9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a  0 Analysis of line 9: a Excess from 2013 b Excess from 2014 c Excess from 2015 d Excess from 2016	section 170(b)(1)(F) or 4942(g)(3) (Election				!
not applied on line 5 or line 7  9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a  0 Analysis of line 9: a Excess from 2013 b Excess from 2014 c Excess from 2016	may be required - see instructions)	0.			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a 0 Analysis of line 9: a Excess from 2013 b Excess from 2014 c Excess from 2015 d Excess from 2016	8 Excess distributions carryover from 2012	-			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a 0 Analysis of line 9: a Excess from 2013 b Excess from 2014 c Excess from 2015 d Excess from 2016		<u> </u>			
Subtract lines 7 and 8 from line 6a  O Analysis of line 9: a Excess from 2013 b Excess from 2014 c Excess from 2015 d Excess from 2016					
0 Analysis of line 9: a Excess from 2013 b Excess from 2014 c Excess from 2015 d Excess from 2016	· · · · · · · · · · · · · · · · · · ·	0.			
a Excess from 2013 b Excess from 2014 c Excess from 2015 d Excess from 2016					
b Excess from 2014 c Excess from 2015 d Excess from 2016	•			]	
c Excess from 2015 d Excess from 2016			1		,
d Excess from 2016	<del></del>			1	
<del></del>			ļ		

FLORENCE & RICHARD KOPLOW FAMILY Form 990-PF (2017) FOUNDATION C/O FLORENCE KOPLOW, TRUSTEE 04-6862775 Page 10 Private Operating Foundations (see instructions and Part VII-A, question 9) N/A 1 a 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 4942(j)(5) 4942(1)(3) or b Check box to indicate whether the foundation is a private operating foundation described in section Prior 3 years Tax year 2 a Enter the lesser of the adjusted net (c) 2015 (a) 2017 (b) 2016 (d) 2014 (e) Total 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 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(1)(3)(B)(1) b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year 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 Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.) 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).) FLORENCE KOPLOW, TRUSTEE 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. NONE Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here X 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. 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:

04-6862775 Page 11 FOUNDATION C/O FLORENCE KOPLOW, TRUSTEE Form 990-PF (2017) Part XV Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, show any relationship to any foundation manager or substantial contributor Recipient Purpose of grant or contribution Foundation Amount status of recipient Name and address (home or business) a Paid during the year CHARITABLE SEE ATTACHED STATEMENT P.C N/A 296,940. **▶** 3a 296,940. **b** Approved for future payment NONE

Total

Form 990-PF (2017)

# Part XVI-A · Analysis of Income-Producing Activities

·		<del></del>			
Enter gross amounts unless otherwise indicated.	Unrelate (a) Business	d business income (b)	(C) Exclu- sion	(d)	(e) Related or exempt
1 Program service revenue:	code	Amount	code	Amount	function income
a					
b	_				
c					
d	_				
e	_				
1	-				
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash	1 1				
investments	L				
4 Dividends and interest from securities			14	157,255.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property	L				
<b>b</b> Not debt-financed property	<u> </u>				
6 Net rental income or (loss) from personal	[ [				
property			لبيا		
7 Other investment income			14	25.	
8 Gain or (loss) from sales of assets other					
than inventory		·	18	<29,394.>	
9 Net income or (loss) from special events		   <del></del>			·
O Gross profit or (loss) from sales of inventory		' <del>'</del>			
1 Other revenue:					
a	_				
b	_				·
c	_				
d	_	· 		<u> </u>	
e	_		<u> </u>		
2 Subtotal. Add columns (b), (d), and (e)	L	0.	<u> </u>	127,886.	0
3 Total. Add line 12, columns (b), (d), and (e)				13	127,886
See worksheet in line 13 instructions to verify calculations.)	<u> </u>				
Part XVI-B Relationship of Activities	to the Acco	mplishment of Exe	empt	Purposes	
Line No. Explain below how each activity for which in			contrit	outed importantly to the accord	plishment of
the foundation's exempt purposes (other that	an by providing fui	nds for such purposes).			
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FLORENCE & RICHARD KOPLOW FAMILY Form 990-PF (2017) FOUNDATION C/O FLORENCE KOPLOW, TRUSTEE 04-6862775 Page 13 Part XVII Information Regarding Transfers to and Transactions and Relationships With Noncharitable **Exempt Organizations** Yes No Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (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) (2) Other assets 1a(2) b Other transactions: (1) Sales of assets to a noncharitable exempt organization 16(1) (2) Purchases of assets from a noncharitable exempt organization 16(2) (3) Rental of facilities, equipment, or other assets 1b(3) (4) Reimbursement arrangements 16(4) (5) Loans or loan guarantees 1b(5) 16(6) (6) Performance of services or membership or fundraising solicitations c Sharing of facilities, equipment, mailing lists, other assets, or paid employees 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. (b) Amount involved (c) Name of noncharitable exempt organization (a) Line no (d) Description of transfers, transactions, and sharing arrangements N/A 2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described X No Yes in section 501(c) (other than section 501(c)(3)) or in section 527? b If "Yes," complete the following schedule. (a) Name of organization (c) Description of relationship (b) Type of organization N/A ury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge May the IRS discuss this return with the preparer shown below? See instr Sign Here F6-21-201 TRUSTEE X Yes Signature of officer or trustee Title Date

Preparer's signature

Firm's name ► DICICCO, GULMAN & COMPANY, LLP

WOBURN, MA 01801

Firm's address ▶ 150 PRESIDENTIAL WAY, SUITE 510

Sarar a museo

Phone no. 781-937-5300 Form 990-PF (2017)

P00849673

Firm's EIN ► 04-3296226

Check

self- employed

Date

05/17/18

Paid

Preparer

**Use Only** 

Print/Type preparer's name

SARAH A. MURACO

FORM 990-PF	DIVIDEND	S AND INTER	EST FROM SECU	RITIES S	TATEMENT 1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDEND	REVENUE		
CHARLES SCHWAB FROM K-1: BROOKFIELD	149,531	•	0. 149,531	149,531.	
INFRASTRUCTURE PARTNERS, LP	7,724	•	0. 7,724	7,724.	
TO PART I, LINE 4	157,255	•	0. 157,255	157,255.	
FORM 990-PF		OTHER I	NCOME	S	TATEMENT 2
DESCRIPTION		:		(B) NET INVEST- MENT INCOME	
FROM K-1: BROOKFIEL PARTNERS, LP	D INFRASTRU	UCTURE	25.	25.	
TOTAL TO FORM 990-P	F, PART I,	LINE 11	25.	25.	
FORM 990-PF	·	ACCOUNTI	NG FEES	S	TATEMENT 3
		<del></del>		· · · · · · · · · · · · · · · · · · ·	
DESCRIPTION		(A) EXPENSES PER BOOKS		(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	_	6,748.	6,748.		0.
TO FORM 990-PF, PG	1, LN 16B	6,748.	6,748.		0.
FORM 990-PF	O'	THER PROFES	SIONAL FEES	S	TATEMENT 4
DESCRIPTION		(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEME	NT FEES	29,112.	29,112		0 .
TO FORM 990-PF, PG	1, LN 16C	29,112.	29,112	•	0
	_			= =========	<del></del>

FORM 990-PF	TAX	es ———————	STATEMENT 5		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FOREIGN TAXES PAID FEDERAL ESTIMATED TAXES	4,528. 6,761.	4,528.		0.	
TO FORM 990-PF, PG 1, LN 18	11,289.	4,528.		0.	
	<del></del>		-		
				<del></del>	
FORM 990-PF	OTHER E		(C)	TATEMENT 6	
FORM 990-PF DESCRIPTION	OTHER E  (A)  EXPENSES PER BOOKS	(B) NET INVEST-			
DESCRIPTION  MASS FILING FEE	(A) EXPENSES	(B) NET INVEST- MENT INCOME	(C) ADJUSTED	(D) CHARITABLE	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED	(D) CHARITABLE PURPOSES	

FORM 990-PF OT	HER INVESTMENTS		STATEMENT 7
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SCHWAB BOND FUNDS SCHWAB EQUITY FUNDS	COST COST	328,135. 5,020,550.	344,141. 6,132,061.
TOTAL TO FORM 990-PF, PART II, LI	:NE 13	5,348,685.	6,476,202.
FORM 990-PF	OTHER ASSETS		STATEMENT 8
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
DIVIDEND RECEIVABLE SCHWAB BROOKFIELD INFRA PTN LP	4,047.	5,459. 178,772.	5,459. 216,521.

FORM 990-PF OTHER LIABILITIES			STATEMENT 9	
DESCRIPTION		BOY AMOUNT	EOY AMOUNT	
FOREIGN TAX PAYABLE	-	4,047.	4,528.	
TOTAL TO FORM 990-PF, PART II,	LINE 22	4,047.	4,528.	