

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 (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing	541	1,716	1,716
	2	Savings and temporary cash investments	335,000	44,000	44,000
	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)	1,173,200	1,145,549	2,879,288
	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)			
	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)	1,508,741	1,191,265	2,925,004	
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 <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	1,915,892	1,690,046	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	-407,151	-498,781	
30	Total net assets or fund balances (see instructions)	1,508,741	1,191,265		
31	Total liabilities and net assets/fund balances (see instructions) .	1,508,741	1,191,265		

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	1,508,741
2	Enter amount from Part I, line 27a	2	-317,476
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	1,191,265
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	1,191,265

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 PUBLICLY TRADED SECURITIES	P		
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 352,053		148,066	203,987
b			
c			
d			
e			

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			203,987
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	2	203,987
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	453,739	2,843,779	0 159555
2015	474,891	3,215,981	0 147666
2014	435,430	3,460,311	0 125836
2013	436,357	3,343,494	0 130509
2012	387,451	3,150,111	0 122996
2 Total of line 1, column (d)			0 686562
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			0 137312
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5			2,793,924
5 Multiply line 4 by line 3			383,639
6 Enter 1% of net investment income (1% of Part I, line 27b)			2,284
7 Add lines 5 and 6			385,923
8 Enter qualifying distributions from Part XII, line 4			544,569

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	2,284
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2.	3	2,284
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	2,284
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	2,560
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	2,560
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	0
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	276
11	Enter the amount of line 10 to be Credited to 2018 estimated tax ▶ 276 Refunded ▶	11	0

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? 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	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ \$ 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? Website address N/A	13	Yes	
14	The books are in care of LORING WOLCOTT COOLIDGE TRUST LLC Telephone no (617) 523-6531			

Located at **230 CONGRESS STREET BOSTON MA** ZIP+4 **02110**

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year 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	Yes	No

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

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

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? <input type="checkbox"/> 1b			No
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? <input type="checkbox"/> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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). <input type="checkbox"/> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2017 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2017). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No 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))? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Provide a grant to an individual for travel, study, or other similar purposes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/>	5b		
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? <input type="checkbox"/> Yes <input type="checkbox"/> No <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</i>			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <i>If "Yes" to 6b, file Form 8870</i>	6b		No
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	7b		

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

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
ROGER M THOMASRESIGNED 71917 10 LONGWOOD DRIVE APT 228 WESTWOOD, MA 02090	TRUSTEE 3 00	5,256	0	0
JOHN E HOFFMAN JR 279 BOWLDER RD SULLIVAN, NH 03445	TRUSTEE 3 00	0	0	0
WILLIAM A LOWELL CHOATE HALL STEWART LLP 2 INTERNATI NAL PLACE BOSTON, MA 02110	TRUSTEE 3 00	2,631	0	0
GILBERT M RODDY JRSUCCESSOR 7191 LWC C/O 230 CONGRESS STREET 12FL BOSTON, MA 02110	TRUSTEE 3 00	2,114	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	Contributions to employee benefit plans and deferred compensation (d)	Expense account, (e) other allowances
NONE				

Total number of other employees paid over \$50,000. **0****3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services. **0****Part IX-A Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	0
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	0
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	2,733,536
b	Average of monthly cash balances.	1b	102,935
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	2,836,471
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	2,836,471
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	42,547
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	2,793,924
6	Minimum investment return. Enter 5% of line 5.	6	139,696

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	139,696
2a	Tax on investment income for 2017 from Part VI, line 5.	2a	2,284
b	Income tax for 2017 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	2,284
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	137,412
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	137,412
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	137,412

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	544,569
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	544,569
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	2,284
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	542,285

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				137,412
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.	232,925			
b From 2013.	272,454			
c From 2014.	269,800			
d From 2015.	320,864			
e From 2016.	316,618			
f Total of lines 3a through e.	1,412,661			
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ 544,569				
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.				137,412
e Remaining amount distributed out of corpus	407,157			
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a))	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	1,819,818			
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).	232,925			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	1,586,893			
10 Analysis of line 9				
a Excess from 2013.	272,454			
b Excess from 2014.	269,800			
c Excess from 2015.	320,864			
d Excess from 2016.	316,618			
e Excess from 2017.	407,157			

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

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.)

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

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

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

- 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	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			3a	539,500
b <i>Approved for future payment</i>				
Total			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2017)

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

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?		Yes	No
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.		
	*****	2018-05-01	*****
	Signature of officer or trustee	Date	Title

May the IRS discuss this return with the preparer shown below (see instr)? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
--

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed <input type="checkbox"/>	PTIN
	MARY JEAN MOUGHAN				P00133963
	Firm's name ► LORING WOLCOTT & COOLIDGE TRUST LLC				Firm's EIN ► 27-3396508
	Firm's address ► 230 CONGRESS STREET BOSTON, MA 021102437				Phone no (617) 523-6531

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ANTIOCH UNIVERSITY NEWENGLAND 40 AVON STREET KEENE, NH 03431	NONE	PC	GENERAL	20,000
APPLE HILL CENTER FOR CHAMBER MUSIC APPLE HILL ROAD PO BOX 217 SULLIVAN, NH 03445	NONE	PC	OPERATING SUPPORT	10,000
ARTS ALIVE INC 39 CENTRAL SQUARE SUITE 203 KEENE, NH 03431	NONE	PC	OPERATING SUPPORT	18,000
BRANFORD COMPASSION CLUB PO BOX 768 BRANFORD, CT 06405	NONE	PC	GENERAL	2,000
CALIFORNIA WOMENS RECOVERY INC 668 N COAST HWY 1250 LAGUNA BEACH, CA 92651	NONE	PC	GENERAL	1,000
Total 				539,500
3a				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CEDARCREST INC91 MAPLE AVENUE KEENE, NH 03431	NONE	PC	GENERAL	1,000
CHESHIRE HEALTH FOUNDATION 580 COURT STREET KEENE, NH 03431	NONE	PC	GENERAL	25,000
COLONIAL THEATER GROUP 95 MAIN STREET KEENE, NH 03431	NONE	PC	GENERAL	5,000
ERIC CARLE MUSEUM OF PICTURE BOOK ART 125 WEST BAY ROAD AMHERST, MA 01002	NONE	PC	GENERAL	1,000
FIRST CHURCH IN WEYMOUTH 17 CHURCH ST WEYMOUTH, MA 02189	NONE	PC	GENERAL	3,000
Total ► 3a				539,500


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
FIRST CONGREGATIONAL CHURCH OF SOUTH HADLEY MA ONE CHURCH STREET SOUTH HADLEY, MA 01075	NONE	PC	OUTREACH PROGRAM	8,000
FRIENDS OF THE HOMELESS OF THE SOUTH SHORE 8 DRIFTWAY RD WEYMOUTH, MA 02191	NONE	PC	GENERAL	1,000
FRIENDS OF THE KEENE PUBLIC LIBRARY 60 WINTER STREET KEENE, NH 03431	NONE	PC	GENERAL	10,000
GIRLS INCORPORATED OF HOLYOKE 6 OPEN SQUARE WAY HOLYOKE, MA 01040	NONE	PC	GENERAL	1,000
GIRLS ON THE RUN INTERNATIONAL 801 EAST MOREHEAD STREET SUITE 201 CHARLOTTE, NC 28202	NONE	PC	GENERAL	1,000
Total ▶ 3a				539,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
GRANITE STATE CHILDRENS ALLIANCE 2 WELLMAN AVENUE SUITE 140 NASHUA, NH 03064	NONE	PC	GENERAL	1,000
GRANITE STATE MONARCHSPO BOX 258 KEENE, NH 03431	NONE	PC	GENERAL	1,000
HGM DEVELOPMENT INC42 MAIN ST KEENE, NH 03431	NONE	PC	GENERAL OPERATING SUPPORT	1,000
HISTORICAL SOCIETY OF CHESIRE COUNTY 246 MAIN STREET KEENE, NH 03431	NONE	PC	OPERATING SUPPORT	1,000
HOME HEALTHCARE HOSPICE AND COMMUNITY SERVICES PO BOX 564 KEENE, NH 03431	NONE	PC	OPERATING SUPPORT	5,000
Total ▶ 3a				539,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
HUNDRED NIGHTS INC PO BOX 833 17 LAMSON STREET KEENE, NH 03431	NONE	PC	OPERATING SUPPORT	10,000
KEENE ELM CITY ROTARY CLUB 835 COURT ST KEENE, NH 03431	NONE	PC	GENERAL	18,000
KEENE FAMILY YMCA38 ROXBURY ST KEENE, NH 03431	NONE	PC	GENERAL	1,000
KEENE SENIOR CITIZENS INC 70 COURT ST KEENE, NH 03431	NONE	PC	GENERAL	3,000
KEENE SERENITY CENTER INC PO BOX 327 KEENE, NH 03431	NONE	PC	GENERAL	15,000
Total ▶ 3a				539,500

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
KEENE STATE COLLEGE 229 MAIN STREET KEENE, NH 03431	NONE	PC	GENERAL	7,000
LEUKEMIA AND LYMPHOMA SOCIETY 9 ERIE DRIVE NATICK, MA 01760	NONE	PC	GENERAL	5,000
MAPS COUNSELING SERVICES 19 FEDERAL STREET KEENE, NH 03431	NONE	PC	GENERAL	10,000
MASTERS SCHOOL49 CLINTON AVENUE DOBBS FERRY, NY 10522	NONE	PC	GENERAL	6,500
MONADNOCK CENTER FOR VIOLENCE PREVENTION 12 COURT ST KEENE, NH 03431	NONE	PC	GENERAL	5,000
Total ► 3a				539,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MONADNOCK CONSERVANCY PO BOX 337 KEENE, NH 03431	NONE	PC	GENERAL	1,000
MONADNOCK FAMILY SERVICES 17 93RD STREET KEENE, NH 03431	NONE	PC	GENERAL OPERATING SUPPORT	25,000
MONADNOCK REGION HUMANE SOCIETY 101 W SWANZEY ROAD SWANZEY, NH 03446	NONE	PC	GENERAL	2,000
MONADNOCK UNITED WAY 23 CENTER STREET KEENE, NH 03431	NONE	PC	GENERAL	90,000
MOVING COMPANY DANCE CENTER 76 RAILROAD STREET KEENE, NH 03431	NONE	PC	OPERATING SUPPORT	105,000
Total 				539,500
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
NACKEY S LOEB SCHOOL OF COMMUNICATION INC 749 EAST INDUSTRIAL PARK DRIVE MANCHESTER, NH 03109	NONE	PC	GENERAL	5,000
NEW HAMPSHIRE CENTER FOR NONPROFITS 10 FERRY STREET SUITE 315 CONCORD, NH 03301	NONE	PC	GENERAL	15,000
NEW HAMPSHIRE CENTER FOR PUBLIC POLICY 1 EAGLE SQUARE 510 CONCORD, NH 03301	NONE	PC	GENERAL	1,000
NEW HAMPSHIRE CHARITABLE FOUNDATION 37 PLEASANT STREET CONCORD, NH 03301	NONE	PC	GENERAL	54,000
NEW HAMPSHIRE COMMUNITY LOAN FUND 7 WALL STREET CONCORD, NH 03301	NONE	PC	GENERAL OPERATING SUPPORT	1,000
Total ► 3a				539,500

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
NEW HAMPSHIRE FISCAL POLICY 64 NORTH MAIN ST 3RD FL CONCORD, NH 03301	NONE	PC	GENERAL OPERATING SUPPORT	1,000
NEW HAMPSHIRE HUMANITIES COUNCIL 117 PLEASANT STREET CONCORD, NH 03301	NONE	PC	GENERAL	2,000
NEW HAMPSHIRE PUBLIC RADIO INC 207 NORTH MAIN STREET CONCORD, NH 03301	NONE	PC	GENERAL	10,000
PETERBOROUGH PLAYERS 55 STEARNS FARM ROAD PETERBOROUGH, NH 03458	NONE	PC	GENERAL	1,000
PRINCETON UNIVERSITY 330 ALEXANDEWR ST PRINCETON, NJ 08540	NONE	PC	GENERAL	1,000
Total ▶ 3a				539,500

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SOCIETY FOR THE PROTECTION OF NH FORESTS 54 PORTSMOUTH STREET CONCORD, NH 03301	NONE	PC	GENERAL	5,000
STONEWALL FARM 242 CHESTERFIELD RD KEENE, NH 03431	NONE	PC	GENERAL	1,000
THE COMMUNITY KITCHEN 35-37 MECHANIC STREET KEENE, NH 03431	NONE	PC	GENERAL	1,000
UNITED CONGREGATIONAL CHURCH OF SULLIVAN PO BOX 73 SULLIVAN, NH 03445	NONE	PC	OPERATING SUPPORT	18,000
URBAN ROOTS GARDEN CLASSROOM 100 VINE ST RENO, NV 89503	NONE	PC	GENERAL	1,000
Total ► 3a				539,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
WAYFINDER SCHOOLS 215 GLOUCESTER HILL ROAD NEW GLOUCESTER, ME 04260	NONE	PC	GENERAL	1,000
WEYMOUTH FOOD1189 COMMERCIAL ST WEYMOUTH, MA 02189	NONE	PC	GENERAL	1,000
WORLD WILDLIFE FUND 1250 24TH STREET NW PO BOX 97180 WASHINGTON, DC 20037	NONE	PC	GENERAL	1,000
Total ▶ 3a				539,500

TY 2017 Accounting Fees Schedule

Name: HOFFMAN FAMILY FOUNDATION
GILBERT M RODDY JR ET AL TRUSTEES
EIN: 22-2677966

Accounting Fees Schedule

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LORING, WOLCOTT & COOLIDGE TRUST LLC	2,365	2,365		0

TY 2017 General Explanation Attachment**Name:** HOFFMAN FAMILY FOUNDATION

GILBERT M RODDY JR ET AL TRUSTEES

EIN: 22-2677966**General Explanation Attachment**

Identifier	Return Reference	Explanation	
1		PART VIII LINE 1(B)	990PF STATEMENTPART VIII OFFICERS, DIRECTORS, TRUSTEES, FOUNDATION MANAGERSAND THEIR COMPENSATION AND HOURS SPENT PER WEEK HOURS SPENT THE TIME SPENT BY THE TRUSTEE/S MANAGING THE AFFAIRS OF THEFOUNDATION VARIES FROM WEEK TO WEEK AND YEAR TO YEAR FOR990PF REPORTING PURPOSES, AN ESTIMATE OF 1 TO 3 HOURS PERWEEK HAS BEEN INDICATED THE TRUSTEE/S ARE PROFESSIONALFIDUCIARIES WHO MANAGE A NUMBER OF TRUST/FOUNDATIONRELATIONSHIPS AND WHO EMPLOY ACCOUNTING, SUPPORT AND TAXCOMPLIANCE STAFF TO ASSIST WITH THE ADMINISTRATION OF SAIDRELATIONSHIPS THE 1 TO 3 HOUR TIME NOTED REFLECTS ANESTIMATE OF THE TIME SPENT BY THE NAMED TRUSTEE/S AS WELL ASTHEIR AGENTS OR EMPLOY S THE ACTUAL TIME SPENT MAY DIFFERFROM THE ESTIMATE IN ANY GIVEN WEEK/YEAR THE TRUSTEES FEES NOTED ALSO INCLUDES AN INVESTMENT ADVISORY COMPONENT WHICH IS BASED IN PART ON THE FOUNDATION INVESTMENTASSETS AND WHICH VARIES FROM QUARTER TO QUARTER BASED ONFAIR MARKET VALUE

TY 2017 Investments Corporate Stock Schedule

Name:
HOFFMAN FAMILY FOUNDATION
GILBERT M RODDY JR ET AL TRUSTEES
EIN: 22-2677966

Name of Stock	End of Year Book Value	End of Year Fair Market Value
2075 ABBOTT LABORATORIES	16,384	118,420
1000 AUTOMATIC DATA PROCESSING	6,476	117,190
740 COLGATE PALMOLIVE CO	17,435	55,833
1100 JOHNSON & JOHNSON	15,702	153,692
1950 MICROSOFT CORP	12,188	166,803
1125 NESTLE SA SPONS ADR FOR REG	33,012	96,742
950 STRYKER CORP	9,165	147,098
1075 EXXON MOBIL CORP	99,817	89,913
1400 HEINEKEN HOLDING NV	75,734	138,369
900 ACCENTURE PLC	30,361	137,781
1660 CANADIAN NATIONAL RAILWAY	47,179	136,950
1200 TJX COMPANIES	25,737	91,752
1175 MASTERCARD INC	24,236	177,848
1075 FISERV INC	31,611	140,965
1075 JARDINE MATHESON HOLDING LTD	49,891	65,478
630 APPLE INC	51,515	106,615
1850 CHURCH & DWIGHT CO	49,771	92,815
1150 EOG RESOURCES	66,596	124,097
825 INTUIT	49,417	130,169
1075 DANAHER CORP SHS BEN INT	56,203	99,782
560 WALT DISNEY PRODUCTIONS	50,316	60,206
475 ECOLAB INC	49,990	63,736
2040 STARBUCKS CORP	75,356	117,157
525 AMERICAN TOWER CORP	49,793	74,902
600 NIKE INC CLASSB	31,247	37,530
60 ALPHABET INC CLASS A	50,440	63,204
385 ANALOG DEVICES CORP	34,855	34,277
430 LOWES COMPANIES	35,122	39,964

TY 2017 Other Expenses Schedule

Name: HOFFMAN FAMILY FOUNDATION
GILBERT M RODDY JR ET AL TRUSTEES
EIN: 22-2677966

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
COMM OF MA FORM PC ANNUAL REPORT FILING FEE	35	0		35
INVESTMENT EXPENSE	23	23		0

TY 2017 Other Income Schedule**Name:** HOFFMAN FAMILY FOUNDATION

GILBERT M RODDY JR ET AL TRUSTEES

EIN: 22-2677966**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
OVERPAYMENT APPLIED TO 2017	866		866

TY 2017 Other Professional Fees Schedule

Name: HOFFMAN FAMILY FOUNDATION
GILBERT M RODDY JR ET AL TRUSTEES

EIN: 22-2677966

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LWC FIDUCIARY ADVISORS FEE	12,680	12,680		0
LORING WOLCOTT & COOLIDGE TRUST LLC - TAX PREPARATION FEE	1,700	0		1,700

TY 2017 Taxes Schedule

Name: HOFFMAN FAMILY FOUNDATION
GILBERT M RODDY JR ET AL TRUSTEES

EIN: 22-2677966

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
2016 OVERPAYMENT APPLIED TO 2017	866	0		0
2017 ESTIMATED FEDERAL EXCISE TAX	1,694	0		0
FOREIGN TAX PAID	441	326		0