

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

Name of foundation BURT FAMILY FOUNDATION INC		A Employer identification number 30-0633793	
Number and street (or P O box number if mail is not delivered to street address) 5 SHORE ROAD		Room/suite	B Telephone number (see instructions) (860) 439-0289
City or town, state or province, country, and ZIP or foreign postal code WATERFORD, CT 06385		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ 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) \$ 1,455,710	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)				
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	1,321	1,321	1,321	
	4 Dividends and interest from securities	21,083	21,083	21,083	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10 	61,820			
	b Gross sales price for all assets on line 6a _____ 246,751				
	7 Capital gain net income (from Part IV, line 2)		20,003		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	84,224	42,407	22,404	
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) 	4,750			
	c Other professional fees (attach schedule) 	12,774			
	17 Interest				
	18 Taxes (attach schedule) (see instructions) 	35			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 Total operating and administrative expenses. Add lines 13 through 23	17,559	0		0
	25 Contributions, gifts, grants paid	67,000			67,000
	26 Total expenses and disbursements. Add lines 24 and 25	84,559	0		67,000
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-335			
			42,407		
				22,404	

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			
	2 Savings and temporary cash investments	4,867	31,092	31,092
	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)	1,080,765	1,054,209	1,385,304
	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)	32,500	32,500	39,314
	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)	1,118,132	1,117,801	1,455,710	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ _____)			
	23 Total liabilities (add lines 17 through 22)		0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg , and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	1,118,132	1,117,801	
30 Total net assets or fund balances (see instructions)	1,118,132	1,117,801		
31 Total liabilities and net assets/fund balances (see instructions) .	1,118,132	1,117,801		

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	1,118,132
2 Enter amount from Part I, line 27a	2	-335
3 Other increases not included in line 2 (itemize) ▶ _____	3	4
4 Add lines 1, 2, and 3	4	1,117,801
5 Decreases not included in line 2 (itemize) ▶ _____	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	1,117,801

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)
1a			

(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			
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			
b			
c			
d			
e			

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	20,003
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	66,991	1,269,015	0 052790
2015	60,843	1,334,203	0 045603
2014	52,700	1,244,355	0 042351
2013	39,000	1,244,355	0 031342
2012	39,930	1,159,148	0 034448
2 Total of line 1, column (d)			2 0 206534
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 041307
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5			4 1,394,116
5 Multiply line 4 by line 3			5 57,587
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 424
7 Add lines 5 and 6			7 58,011
8 Enter qualifying distributions from Part XII, line 4			8 67,000

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	424
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	
3	Add lines 1 and 2.	3	424
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	424
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	2,826
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	2,826
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	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid ▶	10	2,402
11	Enter the amount of line 10 to be Credited to 2018 estimated tax ▶ 2,402 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)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ \$ _____ (2) On foundation managers ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	2	No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>	5	No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	No
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ _____		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i> .	8b	Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the taxable year beginning in 2017 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions).	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	Yes	
14	The books are in care of CYNTHIA BURT BEEBE Telephone no (860) 439-0289			

Located at **5 SHORE ROAD WATERFORD CT** ZIP+4 **06385**

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	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? ☐ 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			
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			
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). ☐ Yes ☒ 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))?	☐ 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		
	<i>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</i>				
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes	☒ No	6b	
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?				No
	<i>If "Yes" to 6b, file Form 8870</i>				
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes	☒ No	7b	
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?				

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
CYNTHIA BURT BEEBE 5 SHORE ROAD WATERFORD, CT 06385	PRESIDENT TR 1 00	0	0	0
GILLIAN VON NIEDA BEEBE 5 SHORE ROAD WATERFORD, CT 06385	VICE PRESIDE 1 00	0	0	0
HEATHER RHOADES 75 ISHAM ROAD WEST HARTFORD, CT 06107	SECRETARY 1 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	Contributions to employee benefit plans and deferred compensation (d)	Expense account, (e) other allowances
NONE				

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

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. ▶

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 N/A	
2	
All other program-related investments See instructions	
3	

Total. Add lines 1 through 3 ▶

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	1,327,748
b	Average of monthly cash balances.	1b	48,991
c	Fair market value of all other assets (see instructions).	1c	38,607
d	Total (add lines 1a, b, and c).	1d	1,415,346
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	1,415,346
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	21,230
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	1,394,116
6	Minimum investment return. Enter 5% of line 5.	6	69,706

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	69,706
2a	Tax on investment income for 2017 from Part VI, line 5.	2a	424
b	Income tax for 2017 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	424
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	69,282
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	69,282
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	69,282

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	67,000
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	67,000
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	424
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	66,576

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				69,282
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only.			62,095	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2017				
a From 2012.				
b From 2013.				
c From 2014.				
d From 2015.				
e From 2016.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ <u>67,000</u>				
a Applied to 2016, but not more than line 2a			62,095	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2017 distributable amount.				4,905
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2016 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2017 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2018				64,377
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions).				
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2013.				
b Excess from 2014.				
c Excess from 2015.				
d Excess from 2016.				
e Excess from 2017.				

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

1 Information Regarding Foundation Managers:

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

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

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

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

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

- c Any submission deadlines

- 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 <i>Paid during the year</i> See Additional Data Table				
Total			▶ 3a	67,000
b <i>Approved for future payment</i>				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated

Part XVI-B Relationship of Activities to the Accomplishment of Exempt PurposesForm **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.	***** 2018-05-08 *****	May the IRS discuss this return with the preparer shown below? (see instr.)? ☒ Yes ☐ No
	Signature of officer or trustee	Date	Title

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
	JAMES M MAHONEY CPA		2018-05-08		P00412069
	Firm's name ▶ MAHONEY SABOL & COMPANY LLP				Firm's EIN ▶ 06-1289571
	Firm's address ▶ 180 GLASTONBURY BLVD STE 400 GLASTONBURY, CT 060334439				Phone no (860) 541-2000

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>				
ANIMAL WELFARE LEAGUE 10305 SOUTHWEST HIGHWAY CHICAGO RIDGE, IL 60415	NONE	501(C)(3)	GENERAL PURPOSES	500
SHAWNA ENGLISH 10386 NORTH 65TH STREET LONGMONT, CO 80503	NONE	501(C)(3)	GENERAL PURPOSES	2,000
DEFENDERS OF WILDLIFE 1130 17TH ST NW PO BOX 1553 MERRIFIELD, VA 22116	NONE	501(C)(3)	GENERAL PURPOSES	2,000
CAVALIER KING CHARLES SPANIEL RESCU 1345 EAGLE RUN DRIVE SANIBEL, FL 33957	NONE	501(C)(3)	GENERAL PURPOSES	1,500
OCEANA CHARITABLE GRANT 1350 CONNECTICUT AVE NW 5TH FLOOR WASHINGTON, DC 20036	NONE	501(C)(3)	GENERAL PURPOSES	2,000
Total ▶ 3a				67,000

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>				
A PLACE CALLED HOPE 154 POND MEADOW ROAD KILLINGWORTH, CT 06419	NONE	501(C)(3)	GENERAL PURPOSES	2,000
LITTLE LONGEARS MINIATURE DONKEY RESCUE 1558 BOLLINGER RD WESTMINSTER, MD 21157	NONE	501(C)(3)	GENERAL PURPOSES	500
ANIMAL LEGAL DEFENSE FUND 170 EAST COTATI AVE COTATI, CA 94931	NONE	501(C)(3)	GENERAL PURPOSES	1,500
WOODSTOCK FARM ANIMAL SANCTUARY 2 RESCUE ROAD HIGH FALLS, NY 12440	NONE	501(C)(3)	GENERAL PURPOSES	2,000
MANES AND MOTIONS THERAPEUTIC 2150 CORBIN AVENUE NEW BRITAIN, CT 06053	NONE	501(C)(3)	GENERAL PURPOSES	500
Total 				67,000
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>				
EXOTIC FELINE RESCUE CENTER 2221 E ASHBORO ROAD CENTER POINT, IN 47840	NONE	501(C)(3)	GENERAL PURPOSES	1,000
RAY OF LIGHT FARM232 TOWN STREET EAST HADDAM, CT 06423	NONE	501(C)(3)	GENERAL PURPOSES	1,000
TIGER HAVEN237 HARVEY RD KINGSTON, TN 37763	NONE	501(C)(3)	GENERAL PURPOSES	500
THE DAVID SHELDRIK WILDLIFE TRUST 25283 CABOT RD STE 101 LAGUNA HILLS, CA 92653	NONE	501(C)(3)	GENERAL PURPOSES	2,000
COMPANION ANIMAL ALLIANCE 2680 PROGRESS ROAD BATON ROUGE, LA 70807	NONE	501(C)(3)	GENERAL PURPOSES	1,000
Total ► 3a				67,000

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>				
SAVING AMERICA'S MUSTANGS 2683 VIA DE LA VALLEG313 DEL MAR, CA 92014	NONE	501(C)(3)	GENERAL PURPOSES	1,000
NOWZAD DOGS NFP2770 MAIN STREET STE 161 FRISCO, TX 75033	NONE	501(C)(3)	GENERAL PURPOSES	1,500
WILDLIFE REHABILITATORS ASSOCIATION 2865 TOWER HILL ROAD SAUNDERSTOWN, RI 02874	NONE	501(C)(3)	GENERAL PURPOSES	2,000
GUARDIANS OF RESCUE 34 EAST MAIN ST STE 303 SMITHTOWN, NY 11787	NONE	501(C)(3)	GENERAL PURPOSES	2,000
HORSES HEALING HUMANS 340 NEW LONDON TPKE STONINGTON, CT 06178	NONE	501(C)(3)	GENERAL PURPOSES	500
Total 				67,000
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 Paid during the year				
DOUBLE D BAR RANCH 344 WADING RIVER ROAD MANORVILLE, NY 11949	NONE	501(C)(3)	GENERAL PURPOSES	1,000
NORTHEAST ANIMAL SHELTER 347 HIGHLAND AVE SALEM, MA 01970	NONE	301(C)(3)	GENERAL PURPOSES	500
HIGH HOPES THERAPEUTIC RIDING 36 TOWN WOODS RD LYME, CT 06371	NONE	501(C)(3)	GENERAL PURPOSES	1,000
SVM WILDLIFE HOSPITAL OF LOUISIANA LSU FOUNDATION 3796B NICHOLSON DR BATON ROUGE, LA 70802	NONE	501(C)(3)	GENERAL PURPOSES	1,500
POLLINATOR PARTNERSHIP 423 WASHINGTON STREET 5TH FLOOR SAN FRANCISCO, CA 94111	NONE	501(C)(3)	GENERAL PURPOSES	2,000
Total ▶ 3a				67,000

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>				
BAT CONSERVATION INTERNATIONAL 4600 N FAIRFAX DRIVE 7TH FLOOR ARLINGTON, VA 22203	NONE	501(C)(3)	GENERAL PURPOSES	2,000
ANOTHER CHANCE FOR ENGLISH SETTERS 51 LOUDON ROAD SACO, ME 04072	NONE	501(C)(3)	GENERAL PURPOSES	500
PHYSICIANS COMMITTEE FOR RESPONSIBLE MEDICINE 5100 WISCONSIN AVE NW SET 400 WASHINGTON, DC 20016	NONE	501(C)(3)	GENERAL PURPOSES	500
WILD BIRD FUND565 COLUMBUS AVE NEW YORK, NY 10024	NONE	501(C)(3)	GENERAL PURPOSES	1,000
FOUR PAWS INTERNATIONAL 6 BEACON STREET STE 1110 BOSTON, MA 02108	NONE	501(C)(3)	GENERAL PURPOSES	500
Total ▶ 3a				67,000

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>				
DREAMCHASER HORSE RESCUE CENTER & R 6350 KINCHELOE DR FALCON, MO 65490	NONE	501(C)(3)	GENERAL PURPOSES	500
WILD MW1010 PROJECT717 POPLAR AVE BOULDER, CO 80304	NONE	501(C)(3)	GENERAL PURPOSES	1,000
HUDSON RIVER SLOOP CLEARWATER 724 WOLCOTT AVE BEACON, NY 12508	NONE	501(C)(3)	GENERAL PURPOSES	1,000
BEECH BROOK FARM EQUINE RESCUE 77 OCEANVIEW AVE MYSTIC, CT 06355	NONE	501(C)(3)	GENERAL PURPOSES	500
LOUISIANA HORSE RESCUE ASSOCIATION 8900 MELROSE LANE RIVER RIDGE, LA 70123	NONE	501(C)(3)	GENERAL PURPOSES	1,500
Total ► 3a				67,000

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>				
WILDLIFE IN CRISISPO BOX 1246 WESTON, CT 06883	NONE	501(C)(3)	GENERAL PURPOSES	2,000
FRIENDS OF THE ANIMALS BATON ROUGE PO BOX 14871 BATON ROUGE, LA 70898	NONE	501(C)(3)	GENERAL PURPOSES	2,000
HORSE RESCUE UNITED INCPO BOX 308 NEWPORT, NJ 08345	NONE	501(C)(3)	GENERAL PURPOSES	2,000
BORN FREE USAPO BOX 32160 WASHINGTON, DC 20007	NONE	501(C)(3)	GENERAL PURPOSES	2,000
SHUG SIGHTHOUND UNDERGROUND PO BOX 339 MCLEAN, VA 22101	NONE	501(C)(3)	GENERAL PURPOSES	1,000
Total 				67,000
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>				
CENTER FOR GREAT APESPO BOX 488 WAUCHULA, FL 33873	NONE	501(C)(3)	GENERAL PURPOSES	1,000
KILLINGWORTH LAND CONSERVATION TRUS PO BOX 825 KILLINGWORTH, CT 06419	NONE	501(C)(3)	GENERAL PURPOSES	500
GENTLE GIANT DRAFT HORSE RESCUE PO BOX 5058 HAGERSTOWN, MD 21741	NONE	501(C)(3)	GENERAL PURPOSES	500
ANIMAL SHELTER OF THE WOOD PO BOX 1496 HAILEY, ID 83333	NONE	501(C)(3)	GENERAL PURPOSES	1,000
DR STACEY GOLUBPO BOX 273 EAST HAMPTON, CT 06424	NONE	501(C)(3)	GENERAL PURPOSES	1,000
Total 				67,000

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>				
KATHY SCHWARTZ HOWEPO BOX 309 LISBON, MD 21765	NONE	501(C)(3)	GENERAL PURPOSES	2,000
OUR HEN HOUSEPO BOX 310 GERMANTOWN, NY 12526	NONE	501(C)(3)	GENERAL PURPOSES	1,000
BELINDA SHOCKLEY TREASURER PO BOX 32 DELMAR, DE 19940	NONE	501(C)(3)	GENERAL PURPOSES	1,000
CT ANIMAL HOUSEPO BOX 343 WATERFORD, CT 06385	NONE	501(C)(3)	GENERAL PURPOSES	500
THE ELEPHANT SANCTUARY IN TN PO BOX 393 HOHENWALD, TN 38462	NONE	501(C)(3)	GENERAL PURPOSES	1,000
Total 				67,000
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>				
WOLF CONSERVATION CENTER PO BOX 421 SOUTH SALEM, NY 10590	NONE	501(C)(3)	GENERAL PURPOSES	1,000
PEACEFUL VALLEY DONKEY RESCUE PO BOX 5741 SAN ANGELO, TX 76902	NONE	501(C)(3)	GENERAL PURPOSES	500
INTERNATIONAL EXOTIC ANIMAL SANCTUR PO BOX 637 BOYD, TX 76023	NONE	501(C)(3)	GENERAL PURPOSES	1,000
FUR FREE SOCIETYPO BOX 6871 TOWSON, MD 21285	NONE	501(C)(3)	GENERAL PURPOSES	500
BLOCK ISLAND CONSERVANCY INC PO BOX 84 BLOCK ISLAND, RI 02807	NONE	501(C)(3)	GENERAL PURPOSES	1,000
Total ▶ 3a				67,000

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 Paid during the year				
PERFORMING ANIMAL WELFARE SOCIETY PO BOX 849 GALT, CA 95632	NONE	501(C)(3)	GENERAL PURPOSES	1,000
SEA SHEPARD CONSERVATION SOCIETY PO BOX 96059 WASHINGTON, DC 200906059	NONE	501(C)(3)	GENERAL PURPOSES	1,500
Total ▶ 3a				67,000

TY 2017 Accounting Fees Schedule**Name:** BURT FAMILY FOUNDATION INC**EIN:** 30-0633793**Accounting Fees Schedule**

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	4,750			

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2017 Gain/Loss from Sale of Other Assets Schedule

Name: BURT FAMILY FOUNDATION INC
EIN: 30-0633793

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
FACEBOOK, INC		PURCHASE	2017-01		816	528			288	
HALIBURTON CO		PURCHASE	2017-01		1,698	1,097			601	
PEPSI CO INC		PURCHASE	2017-01		3,976	2,707			1,269	
BNY MELLON		PURCHASE	2017-01		33,738	25,096			8,642	
UNITED TECHNOLOGIES		PURCHASE	2017-01		7,159	4,991			2,168	
WILLIAMS COS INC		PURCHASE	2017-01		2,817	3,051			-234	
CITIZENS FINANCIAL GROUP INC		PURCHASE	2017-01		2,536	1,560			976	
INTEL CORP		PURCHASE	2017-01		1,508	1,319			189	
MARATHON PETROLEUM CORP		PURCHASE	2017-02		1,934	2,189			-255	
JOHNSON & JOHNSON		PURCHASE	2017-01		4,853	4,192			661	
MARATHON PETROLEUM CORP		PURCHASE	2017-02		2,373	2,157			216	
INTEL CORP		PURCHASE	2017-02		1,408	1,319			89	
PALO ALTO NETWORKS INC		PURCHASE	2017-03		2,674	3,149			-475	
PIONEER NATURAL RESOURCES CO		PURCHASE	2017-03		1,355	1,190			165	
CABOT OIL & GAS CORP		PURCHASE	2017-03		2,075	2,146			-71	
AMERICAN TOWER CORP		PURCHASE	2017-03		458	381			77	
INTEL CORP		PURCHASE	2017-03		2,103	1,968			135	
TIME WARNER		PURCHASE	2017-03		2,953	2,273			680	
TIME WARNER		PURCHASE	2017-03		2,951	2,241			710	
BROADCOM LTD		PURCHASE	2017-03		1,996	1,344			652	
DREYFUS		PURCHASE	2017-04		660	385			275	
PANERA BREAD CO		PURCHASE	2017-04		935	654			281	
QUALCOMM INC		PURCHASE	2017-04		524	703			-179	
VERIZON COMMUNICATIONS INC		PURCHASE	2017-05		2,065	1,641			424	
QUALCOMM INC		PURCHASE	2017-05		1,091	1,290			-199	
PROCTER & GAMBLE CO		PURCHASE	2017-05		2,583	2,493			90	
SCHLUMBERGER LTD		PURCHASE	2017-05		1,443	1,739			-296	
WELLS FARGO & COMPANY		PURCHASE	2017-05		1,584	1,626			-42	
PFIZER INC		PURCHASE	2017-05		3,845	2,191			1,654	
PANERA BREAD CO		PURCHASE	2017-05		2,508	1,737			771	

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
QUALCOMM INC		PURCHASE	2017-06		2,294	2,523			-229	
PANERA BREAD CO		PURCHASE	2017-06		1,570	1,083			487	
LILLY ELI & CO		PURCHASE	2017-06		793	818			-25	
TAIWAN SEMICONDUCTOR		PURCHASE	2017-06		368	298			70	
APPLE INC		PURCHASE	2017-06		931	835			96	
AT&T		PURCHASE	2017-06		2,696	2,790			-94	
NVIDIA CORP		PURCHASE	2017-06		1,944	1,130			814	
TAIWAN SEMICONDUCTOR MFG		PURCHASE	2017-06		714	597			117	
NVIDIA CORP		PURCHASE	2017-06		609	348			261	
GENERAL ELECTRIC CO		PURCHASE	2017-06		4,624	4,505			119	
APPLE INC		PURCHASE	2017-06		428	417			11	
UNIVERSAL HEALTH SERVICE		PURCHASE	2017-06		922	1,112			-190	
UNIVERSAL HEALTH SERVICE		PURCHASE	2017-06		2,076	2,497			-421	
APPLE INC		PURCHASE	2017-06		584	557			27	
SCHLUMBERGER LTD		PURCHASE	2017-06		1,308	1,596			-288	
AMERICAN TOWER CORP		PURCHASE	2017-06		1,175	855			320	
ACCENTURE PLC-CI A		PURCHASE	2017-06		761	750			11	
ACCENTURE PLC-CI A		PURCHASE	2017-06		1,962	1,953			9	
TIME WARNER INC		PURCHASE	2017-07		999	742			257	
ACCENTURE PLC-CI A		PURCHASE	2017-07		2,703	1,939			764	
TAIWAN SEMICONDUCTOR MFG CO ADR		PURCHASE	2017-07		1,391	1,158			233	
WELLS FARGO		PURCHASE	2017-07		4,679	2,141			2,538	
INTERCONTINENTAL EXCHANGE INC		PURCHASE	2017-07		3,273	1,311			1,962	
MICRON TECHNOLOGY INC		PURCHASE	2017-07		2,092	1,922			170	
MICRON TECHNOLOGY INC		PURCHASE	2017-08		2,417	1,488			929	
MICRON TECHNOLOGY INC		PURCHASE	2017-08		2,495	1,593			902	
MICRON TECHNOLOGY INC		PURCHASE	2017-08		1,411	882			529	
EATON CORP PLC		PURCHASE	2017-08		2,937	2,151			786	
ZIMMER BIOMET HOLDINGS, INC		PURCHASE	2017-08		2,097	2,330			-233	
ALEXION PHARMACEUTICALS INC		PURCHASE	2017-08		925	956			-31	

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
INCYTE CORPORATION		PURCHASE	2017-08		497	412			85	
ABBOTT LABORATORIES		PURCHASE	2017-08		1,467	1,246			221	
INTERCONTINENTAL EXCHANGE		PURCHASE	2017-09		1,296	524			772	
NIKE INC		PURCHASE	2017-09		2,135	2,545			-410	
HOME DEPOT, INC		PURCHASE	2017-09		639	141			498	
DOMINION ENERGY INC		PURCHASE	2017-09		3,849	3,426			423	
PANERA BREAD CO		PURCHASE	2017-07		1,260	849			411	
COMCAST CORP CI A		PURCHASE	2017-10		1,083	1,170			-87	
BROADCOM LTD		PURCHASE	2017-10		1,945	1,363			582	
TESARO INC		PURCHASE	2017-10		1,366	1,929			-563	
BIOMARIN PHARMACEUTICAL INC		PURCHASE	2017-10		1,875	2,239			-364	
ALEXION PHARMACEUTICALS INC		PURCHASE	2017-10		1,101	1,093			8	
NABORS INDUSTRIES LTD		PURCHASE	2017-10		750	1,737			-987	
NABORS INDUSTRIES LTD		PURCHASE	2017-10		2,252	3,894			-1,642	
MERCK & CO INC		PURCHASE	2017-10		1,873	1,934			-61	
BROADCOM LTD		PURCHASE	2017-10		978	324			654	
LILLY ELI & CO		PURCHASE	2017-11		1,657	1,635			22	
EMPIRE STATE REALTY TRUST-A		PURCHASE	2017-11		1,201	1,219			-18	
EMPIRE STATE REALTY TRUST -A		PURCHASE	2017-11		599	606			-7	
BROADCOM LTD		PURCHASE	2017-11		1,616	252			1,364	
TIME WARNER INC		PURCHASE	2017-11		1,831	1,465			366	
VOYA FINANCIAL INC		PURCHASE	2017-11		1,645	1,622			23	
ELECTRONIC ARTS INC		PURCHASE	2017-11		1,183	1,007			176	
HARTFORD FINANCIAL SERVICES GROUP IN		PURCHASE	2017-11		1,677	1,405			272	
SYNCHRONY FINANCIAL		PURCHASE	2017-11		1,355	1,102			253	
CITIZENS FINANCIAL GROUP INC		PURCHASE	2017-11		1,529	877			652	
CITIZENS FINANCIAL GROUP INC		PURCHASE	2017-11		3,790	2,144			1,646	
BNY MELLON		PURCHASE	2017-12		10,000	6,717			3,283	
DREYFUS INTL SMALL CAP		PURCHASE	2017-12		15,000	12,503			2,497	
BROADCOM LTD		PURCHASE	2017-12		1,551	252			1,299	

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
TWENTY-FIRST CENTURY FOX INC		PURCHASE	2017-12		1,412	1,240			172	
COSTCO WHSL CORP		PURCHASE	2017-12		1,320	1,155			165	
ALPHABET INC		PURCHASE	2017-12		3,219	2,270			949	

TY 2017 Investments Corporate Stock Schedule**Name:** BURT FAMILY FOUNDATION INC**EIN:** 30-0633793

Name of Stock	End of Year Book Value	End of Year Fair Market Value
EQUITIES	808,651	1,144,375
FIXED INCOME	245,558	240,929

TY 2017 Investments - Other Schedule

Name: BURT FAMILY FOUNDATION INC

EIN: 30-0633793

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ALTERNATIVE INVESTMENTS	AT COST	32,500	39,314

TY 2017 Other Increases Schedule

Name: BURT FAMILY FOUNDATION INC
EIN: 30-0633793

Description	Amount
MISCELLANEOUS	4

TY 2017 Other Professional Fees Schedule**Name:** BURT FAMILY FOUNDATION INC**EIN:** 30-0633793

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	12,774			

TY 2017 Taxes Schedule**Name:** BURT FAMILY FOUNDATION INC**EIN:** 30-0633793

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	35			