

For calendar year 2017, or tax year beginning 09-01-2017, and ending 08-31-2018

Name of foundation SHERRY AND ALAN LEVENTHAL FAMILY FDN C/O BEACON CAPITAL		A Employer identification number 26-3358768	
Number and street (or P.O. box number if mail is not delivered to street address) 200 STATE STREET 5TH FL		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code BOSTON, MA 02109		B Telephone number (see instructions) (617) 457-0489	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here 2. Foreign organizations meeting the 85% test, check here and attach computation	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 362,308		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here	
J Accounting method ☐ Cash ☒ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis)			

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)	1,992,544			
	2 Check ☐ If the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	43	43		
	4 Dividends and interest from securities	15,436	15,436		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10 _____	734,340			
	b Gross sales price for all assets on line 6a _____ 1,984,647				
	7 Capital gain net income (from Part IV, line 2)		734,340		
	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	2,742,363	749,819		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	183	0		183
	b Accounting fees (attach schedule)	5,660	1,415		4,245
	c Other professional fees (attach schedule)	22,669	7,481		13,163
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	7,409	0		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	500	0		500
	24 Total operating and administrative expenses. Add lines 13 through 23	36,421	8,896		18,091
	25 Contributions, gifts, grants paid	3,710,603			3,710,603
	26 Total expenses and disbursements. Add lines 24 and 25	3,747,024	8,896		3,728,694
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-1,004,661			
	b Net investment income (if negative, enter -0-)		740,923		
c Adjusted net income (if negative, enter -0-)					

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)			Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value			
Assets	1	Cash—non-interest-bearing	2,043,648	344,790	344,790		
	2	Savings and temporary cash investments					
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____					
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____					
	5	Grants receivable					
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)					
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____	39,225	0	0		
	8	Inventories for sale or use					
	9	Prepaid expenses and deferred charges	24,927	17,518	17,518		
	10a	Investments—U S and state government obligations (attach schedule)					
	b	Investments—corporate stock (attach schedule)					
	c	Investments—corporate bonds (attach schedule)					
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
	12	Investments—mortgage loans					
	13	Investments—other (attach schedule)					
	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)	2,107,800	362,308	362,308			
Liabilities	17	Accounts payable and accrued expenses	900	2,306			
	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)	900	2,306			
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	2,106,900	360,002			
	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					
	30	Total net assets or fund balances (see instructions)	2,106,900	360,002			
31	Total liabilities and net assets/fund balances (see instructions) .	2,107,800	362,308				

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	2,106,900
2	Enter amount from Part I, line 27a	2	-1,004,661
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	1,102,239
5	Decreases not included in line 2 (itemize) ▶ _____	5	742,237
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	360,002

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 MATTHEWS PACIFIC TIGER FUND-IS #102		2018-05-01	2018-05-02
b VIRTUS VONTOBEL EMERGING MKTS OPPOR		2018-05-01	2018-05-02
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 1,430,825		858,307	572,518
b 553,822		392,000	161,822
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			572,518
b			161,822
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	734,340
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	6,045,194	2,812,298	2 149557
2015	5,646,820	3,261,114	1 731562
2014	4,071,060	4,040,431	1 007581
2013	3,924,540	1,831,843	2 142400
2012	2,267,369	1,505,265	1 506292
2 Total of line 1, column (d)			2 8 537392
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 1 707478
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5			4 1,394,757
5 Multiply line 4 by line 3			5 2,381,517
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 7,409
7 Add lines 5 and 6			7 2,388,926
8 Enter qualifying distributions from Part XII, line 4			8 3,728,694

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	7,409
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	7,409
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	7,409
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	24,927
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	24,927
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	0
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	17,518
11	Enter the amount of line 10 to be Credited to 2018 estimated tax ☐ 17,518 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	Yes

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 ► THE FOUNDATION Telephone no ► (617) 457-0489			

Located at **►** 200 STATE STREET 5TH FLOOR BOSTON MA ZIP+4 **►** 02109

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)? ☐ Organizations relying on a current notice regarding disaster assistance check here. ► ☐	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		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? ☐ Yes ☒ No If "Yes," list the years ► 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions). ☐	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2017 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2017). ☐	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017?	4b		No

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

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No		
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No		
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No		
	(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions).	☐ Yes ☒ No		
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No		
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?		5b	
	Organizations relying on a current notice regarding disaster assistance check here.	☐		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	☐ Yes ☐ No		
	<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		
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b	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		
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		7b	

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

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
ALAN M LEVENTHAL 200 STATE STREET 5TH FLOOR BOSTON, MA 02109	TRUSTEE 2 00	0	0	0
SHERRY M LEVENTHAL 200 STATE STREET 5TH FLOOR BOSTON, MA 02109	TRUSTEE 2 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. **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 GRANT MAKING	3,725,791
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	

Total. Add lines 1 through 3. **0**

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	0
b	Average of monthly cash balances.	1b	1,398,465
c	Fair market value of all other assets (see instructions).	1c	17,532
d	Total (add lines 1a, b, and c).	1d	1,415,997
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	1,415,997
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	21,240
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	1,394,757
6	Minimum investment return. Enter 5% of line 5.	6	69,738

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	69,738
2a	Tax on investment income for 2017 from Part VI, line 5.	2a	7,409
b	Income tax for 2017 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	7,409
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	62,329
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	62,329
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	62,329

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	3,728,694
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	3,728,694
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	7,409
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	3,721,285

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				62,329
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.	2,213,109			
b From 2013.	3,883,117			
c From 2014.	3,962,765			
d From 2015.	5,540,520			
e From 2016.	5,939,865			
f Total of lines 3a through e.	21,539,376			
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ <u>3,728,694</u>				
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.				62,329
e Remaining amount distributed out of corpus	3,666,365			
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	25,205,741			
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).	2,213,109			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	22,992,632			
10 Analysis of line 9				
a Excess from 2013.	3,883,117			
b Excess from 2014.	3,962,765			
c Excess from 2015.	5,540,520			
d Excess from 2016.	5,939,865			
e Excess from 2017.	3,666,365			

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

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

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

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

	Tax year	Prior 3 years			(e) Total
	(a) 2017	(b) 2016	(c) 2015	(d) 2014	
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					

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

a "Assets" alternative test—enter

(1) Value of all assets

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

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

c "Support" alternative test—enter

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

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

(3) Largest amount of support from an exempt organization

(4) Gross investment income

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

1 Information Regarding Foundation Managers:

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

ALAN M LEVENTHAL

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

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

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

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

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

c Any submission deadlines

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

Part XV **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> See Additional Data Table				
Total			▶ 3a	3,710,603
b <i>Approved for future payment</i>				
Total			▶ 3b	0

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a	_____					
b	_____					
c	_____					
d	_____					
e	_____					
f	_____					
g	Fees and contracts from government agencies					
2	Membership dues and assessments. . . .					
3	Interest on savings and temporary cash investments					43
4	Dividends and interest from securities. . . .					15,436
5	Net rental income or (loss) from real estate					
a	Debt-financed property.					
b	Not debt-financed property.					
6	Net rental income or (loss) from personal property					
7	Other investment income.					
8	Gain or (loss) from sales of assets other than inventory					734,340
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue a _____					
b	_____					
c	_____					
d	_____					
e	_____					
12	Subtotal Add columns (b), (d), and (e). .		0		0	749,819
13	Total. Add line 12, columns (b), (d), and (e).			13		749,819

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

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

	Yes	No
--	-----	----

--	--	--

1a(1)		No
1a(2)		No

--	--	--

1b(1)	No
--------------	-----------

1b(2)		No
--------------	--	-----------

1b(3)		No
--------------	--	-----------

1b(4)		No
--------------	--	-----------

1b(5)		No
--------------	--	-----------

1b(6)		No
--------------	--	-----------

1c		No
----	--	----

value
ue

[illegible]

described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

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

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.

**Sign
Here**

* * * * *

2019-07-02

* * * * *

Signature of officer or trustee

Date _____

Title

May the IRS discuss this return with the preparer shown below

(see instr)? ☒ Yes ☐ No

**Paid
Preparer
Use Only**

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
	JOLANTA TUCK CPA		2019-06-26		P01340068
	Firm's name ▶ KEVIN P MARTIN ASSOCIATES PC				Firm's EIN ▶ 04-3097400
	Firm's address ▶ 10 FORBES WEST BRAINTREE, MA 02184				Phone no (781) 380-3520

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>				
02 FOR LIFE RAINFOREST FOUNDATION 23 ELIOT ROAD LEXINGTON, MA 02421	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	500
2018 NOLA FOUNDATION 201 ST CHARLES AVENUE SUITE 114-404 NEW ORLEANS, LA 70170	NONE	PUBLIC CHARITY	GALLIER HALL LEGACY PROJECT - THE SHERRY AND ALAN LEVENTHAL BALLROOM	150,000
ALLIANCE FOR CHILDREN FOUNDATION 17 OAK STREET NEEDHAM, MA 02492	NONE	PUBLIC CHARITY	CHARITABLE DONATION	12,500
Total ► 3a				3,710,603

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>				
AMISTAD RESEARCH CENTER 6823 ST CHARLES AVENUE NEW ORLEANS, LA 70118	NONE	PUBLIC CHARITY	CONTRIBUTION - AMISTAD ON THE GO	55,000
ANTI-DEFAMATION LEAGUE 40 COURT ST FL 12 BOSTON, MA 02108	NONE	PUBLIC CHARITY	A I BOTNICK TORCH OF LIBERTY AWARDS	10,000
ARTS AT MIT 20 AMES STREET BLDG E15 ATRIUM LEVEL CAMBRIDGE, MA 02139	NONE	PUBLIC CHARITY	2018 EUGENE MCDERMOTT AWARD	10,000
Total ► 3a				3,710,603

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>				
ASSOCIATES OF THE BOSTON PUBLIC LIBRARY 700 BOYLSTON STREET BOSTON, MA 02116	NONE	PUBLIC CHARITY	CONTRIBUTION - IN LITERARY LIGHTS	5,000
BEST BUDDIES MASSACHUSETTS 529 MAIN STREET SUITE 202 BOSTON, MA 02129	NONE	PUBLIC CHARITY	CONTRIBUTION	500
BOSTON CHILDREN'S HOSPITAL 300 LONGWOOD AVENUE BOSTON, MA 02115	NONE	PUBLIC CHARITY	CORPORATE CUP - LORI THIBEAULT SPONSORSHIP	1,000
Total ► 3a				3,710,603

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>				
BOSTON MEDICAL CENTER 88 EAST NEWTON STREET BOSTON, MA 02118	NONE	PUBLIC CHARITY	CONTRIBUTION	20,000
BOSTON SYMPHONY ORCHESTRA 301 MASSACHUSETTS AVENUE BOSTON, MA 02115	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	2,500
BOSTON UNIVERSITY 595 COMMONWEALTH AVENUE BOSTON, MA 02215	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	50,000
Total 3a				3,710,603

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				
BRIGHAM & WOMEN'S HOSPITAL 1153 CENTRE STREET BOSTON, MA 02130	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	100,000
BROOKLINE COMMUNITY MENTAL HEALTH CENTER 41 GARRISON ROAD BROOKLINE, MA 02445	NONE	PUBLIC CHARITY	CONTRIBUTION	1,000
BUCKINGHAM BROWNE & NICHOLS SCHOOL 46 BELMONT STREET WATERTOWN, MA 02472	NONE	PUBLIC CHARITY	ANNUAL FUND	60,000
Total ► 3a				3,710,603

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				
CHILDREN'S HOSPITAL 300 LONGWOOD AVENUE BOSTON, MA 02115	NONE	PUBLIC CHARITY	CHAMPIONS EVENT	15,000
COMBINED JEWISH PHILANTHROPIES 126 HIGH STREET BOSTON, MA 02110	NONE	PUBLIC CHARITY	ANNUAL CAMPAIGN	227,500
COMMUNITY HOSPICE 4266 SUNBEAM ROAD JACKSONVILLE, FL 32257	NONE	PUBLIC CHARITY	IN MEMORY - JOSEPH W HOPFENSPIRGER	500
Total ▶ 3a				3,710,603

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>				
DAMON RUNYON CANCER RESEARCH FOUNDATION 55 BROADWAY SUITE 302 NEW YORK, NY 10006	NONE	PUBLIC CHARITY	CONTRIBUTION	200,000
EDGAR DOOKY JR & LEAH CHASE FAMILY FOUNDATION PO BOX 791313 NEW ORLEANS, LA 70179	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	2,500
FACING HISTORY AND OURSELVES 16 HURD RD BROOKLINE, MA 02445	NONE	PUBLIC CHARITY	IN MEMORY OF RHODA SAPERS	500
Total 				3,710,603
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>				
FRENCH QUARTER CITIZENS 632 NORTH RAMPART STREET NEW ORLEANS, LA 70112	NONE	PUBLIC CHARITY	CONTRIBUTION "NEW ORLEANS THEN AND NOW"	1,000
FRIENDS OF THE PUBLIC GARDEN 69 BEACON STREET BOSTON, MA 02108	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION - HENRY AND JOAN LEE SCULPTURE ENDOWMENT	25,000
GREATER NEW ORLEANS FOUNDATION 919 ST CHARLES AVE NEW ORLEANS, LA 70130	NONE	PUBLIC CHARITY	PAY IT FORWARD FUND - HURRICAN HARVEY RELIEF	50,000
Total ▶ 3a				3,710,603

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>				
HEADING HOMESCHRAFFT CENTER CHARLESTOWN, MA 02129	NONE	PUBLIC CHARITY	CONTRIBUTION - 2018 HOUSEWARMING EVENT	25,000
INNER CITY SCHOLARSHIP FUND 1011 1ST AVE STE 1800 NEW YORK, NY 10022	NONE	PUBLIC CHARITY	CONTRIBUTION - IC SCHOLARSHIP FUND	25,000
INNOVATION NETWORK FOR COMMUNITIES 156 GROVER LANE TAMWORTH, NH 03886	NONE	PUBLIC CHARITY	CARBON FREE BOSTON INITIATIVE	60,000
Total ▶ 3a				3,710,603

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>				
ISIDORE NEWMAN SCHOOL 1903 JEFFERSON AVENUE NEW ORLEANS, LA 70115	NONE	PUBLIC CHARITY	FY 2018 ANNUAL FUND DONATION	5,500
JEWISH COMMUNITY DAY SCHOOL 57 STANLEY AVE WATERTOWN, MA 02472	NONE	PUBLIC CHARITY	ANNUAL CAMPAIGN GALA	1,800
JEWISH FEDERATION OF GREATER NEW ORLEANS 3747 W ESPLANADE AVENUE METAIRIE, LA 70002	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	15,000
Total ► 3a				3,710,603

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>				
JOHN F KENNEDY LIBRARY FOUNDATION COLUMBIA POINT BOSTON, MA 02125	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	12,500
JUSTINE MEE LIFF PARTY IN THE PARK EMERALD NECKLACE CONSERVANCY 125 FENWAY BOSTON, MA 02115	NONE	PUBLIC CHARITY	CONTRIBUTION - JUSTIN MEE LIFF FUND	10,000
LINK STRYJEWSKI FOUNDATION 930 TCHOUPITOULAS ST NEW ORLEANS, LA 70130	NONE	PUBLIC CHARITY	CONTRIBUTION	1,000
Total ▶ 3a				3,710,603

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>				
LOUISIANA BAR FOUNDATION 1615 POYDRAS ST NEW ORLEANS, LA 70112	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	500
LOYOLA UNIVERSITY SCHOOL OF MASS COMMUNICATIONS 1032 W SHERIDAN RD CHICAGO, IL 60660	NONE	PUBLIC CHARITY	IN HONOR OF ANGELA HILL	10,000
MASSACHUSETTS GENERAL HOSPITAL 55 FRUIT STREET BOSTON, MA 02114	NONE	PUBLIC CHARITY	TRANSPLANT RESEARCH FUND IN MEMORY OF CHARLES CAMPION	1,000
Total ► 3a				3,710,603

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>				
MASSACHUSETTS INSTITUTE OF TECHNOLOGY 77 MASSACHUSETTS AVE CAMBRIDGE, MA 02139	NONE	PUBLIC CHARITY	CENTER FOR ADVANCED URBANISM	1,478,000
MELANOMA FOUNDATION OF NEW ENGLAND 490 VIRGINIA RD 11 CONCORD, MA 01742	NONE	PUBLIC CHARITY	CONTRIBUTION - SHADES OF HOPE	3,000
MITS1354 HANCOCK ST 302 QUINCY, MA 02169	NONE	PUBLIC CHARITY	CONTRIBUTION	2,500
Total ► 3a				3,710,603

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>				
MSPCA ANGELL 350 SOUTH HUNTINGTON AVEN BOSTON, MA 02130	NONE	PUBLIC CHARITY	ANGELL'S CENTENNIAL CAMPAIGN	20,000
MUSEUM OF FINE ARTS 465 HUNTINGTON AVE BOSTON, MA 02115	NONE	PUBLIC CHARITY	CONTRIBUTION - PATRON, SHERRY AND ALAN LEVENTHAL	3,000
MWPC89 SOUTH ST 603 BOSTON, MA 02111	NONE	PUBLIC CHARITY	CONTRIBUTION - ABIGAIL ADAMS AWARDS	2,500
Total ▶ 3a				3,710,603

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>				
NEIGHBORHOOD HOUSE CHARTER SCHOOL 21 QUEEN STREET DORCHESTER, MA 02122	NONE	PUBLIC CHARITY	2017 BELIEVE IN ME GALA	50,000
NEW ENGLAND AQUARIUM CENTRAL WHARF BOSTON, MA 02110	NONE	PUBLIC CHARITY	ANNUAL FUND FY 2017	10,000
NEW ORLEANS CULINARY & HOSPITALITY INSTITUTE 725 HOWARD AVE NEW ORLEANS, LA 70130	NONE	PUBLIC CHARITY	SHERRY AND ALAN LEVENTHAL BAKING & PASTRY LAB	50,000
Total 				3,710,603
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>				
NORMAN B LEVENTHAL MAP CENTER AT BPL 700 BOYLSTON ST BOSTON, MA 02116	NONE	PUBLIC CHARITY	CONTRIBUTION	220,497
NORTHWESTERN UNIVERSITY 2020 RIDGE AVENUE EVANSTON, IL 60208	NONE	PUBLIC CHARITY	CONTRIBUTION - ANNUAL FUND	10,000
PAWSWATCH CAT RESCUEPO BOX 7005 WARWICK, RI 02887	NONE	PUBLIC CHARITY	IN MEMORY OF JAMES V YOUNG	500
Total ▶ 3a				3,710,603

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>				
PINE MANOR COLLEGE400 HEATH ST CHESTNUT HILL, MA 02467	NONE	PUBLIC CHARITY	ANNUAL FUND	25,000
PMC-JIMMY FUND 10 BROOKLINE PLACE WEST 6TH FLOOR BROOKLINE, MA 02445	NONE	PUBLIC CHARITY	SPONSORSHIP OF 3 INDIVIDUALS	3,000
PRO BONO PUBLICO FOUNDATION 601 POYDRAS STREET SUITE 1815 NEW ORLEANS, LA 70130	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	5,000
Total ▶ 3a				3,710,603

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>				
PROJECT CITIZENSHIP 4 FANEUIL S MARKET BLDG NO 4005 BOSTON, MA 02109	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	2,500
REGIS COLLEGE235 WELLESLEY ST WESTON, MA 02493	NONE	PUBLIC CHARITY	CONTRIBUTION - STUDENT SCHOLARSHIPS	5,000
ROGERSON COMMUNITIES 1 FLORENCE ST ROSLINDALE, MA 02131	NONE	PUBLIC CHARITY	ANNUAL FUND - 2017	5,000
Total ▶ 3a				3,710,603

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>				
SCHOLAR ATHLETES57 MAGAZINE ST ROXBURY, MA 02119	NONE	PUBLIC CHARITY	CONTRIBUTION	50,000
SPIRIT OF ADVENTURE COUNCIL 600 W CUMMINGS PARK WOBURN, MA 01801	NONE	PUBLIC CHARITY	CONTRIBUTION - 1ST SALUTE TO SCOUTING	5,000
TALL SHIPS NEW ORLEANS 2018 1010 COMMON STREET SUITE 2950 NEW ORLEANS, LA 70112	NONE	PUBLIC CHARITY	DONATION	5,000
Total ▶ 3a				3,710,603

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>				
TEMPLE BETH ELOHIM10 BETHEL ROAD WELLESLEY, MA 02481	NONE	PUBLIC CHARITY	2018-2019 DONATION	7,306
THE BOSTON ATHENAEUM 10 BEACON ST BOSTON, MA 02108	NONE	PUBLIC CHARITY	ANNUAL FUND CONTRIBUTION	3,000
THE FUND FOR PARKS AND RECREATION 1010 MASS AVENUE BOSTON, MA 02118	NONE	PUBLIC CHARITY	MARTIN RICHARDS PARK	55,000
Total ▶ 3a				3,710,603

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>				
THE SALVATION ARMY 615 SLATERS LANE ALEXANDRIA, VA 22313	NONE	PUBLIC CHARITY	SOUPER BOWL GALA CONTRIBUTION	1,000
TUCK SCHOOL OF BUSINESS 100 TUCK HALL HANOVER, NH 03755	NONE	PUBLIC CHARITY	PAUL DANOS ENDOWED FUND	50,000
TULANE UNIVERSITY - HILLEL 912 BROADWAY NEW ORLEANS, LA 70118	NONE	PUBLIC CHARITY	CHARITABLE CONTRIBUTION	1,000
Total ▶ 3a				3,710,603

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>				
TULANE UNIVERSITY LAW SCHOOL 6329 FRERET ST NEW ORLEANS, LA 70118	NONE	PUBLIC CHARITY	ANNUAL FUND - LAW SCHOOL	20,000
TULANE UNIVERSITY 6823 ST CHARLES AVENUE NEW ORLEANS, LA 70118	NONE	PUBLIC CHARITY	PRESIDENTIAL OPPORTUNITY FUND	400,500
UNITED NEGRO COLLEGE FUND 1805 7TH STREET NW WASHINGTON, DC 20001	NONE	PUBLIC CHARITY	2018 NEW ORLEANS UNCF MAYOR'S MASKED BALL	25,000
Total ▶ 3a				3,710,603

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>				
UNITED WAY OF MASSACHUSETTS BAY 51 SLEEPER ST BOSTON, MA 02110	NONE	PUBLIC CHARITY	RE & BUILDING INDUSTRY LEADERSHIP BREAKFAST - SPONSORSHIP	25,000
Total 				3,710,603
3a				

TY 2017 Accounting Fees Schedule

Name: SHERRY AND ALAN LEVENTHAL FAMILY FDN
C/O BEACON CAPITAL

EIN: 26-3358768

Accounting Fees Schedule

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
KEVIN P MARTIN & ASSOCIATES	5,660	1,415		4,245

TY 2017 Legal Fees Schedule

Name: SHERRY AND ALAN LEVENTHAL FAMILY FDN
C/O BEACON CAPITAL

EIN: 26-3358768

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	183	0		183

TY 2017 Other Decreases Schedule**Name:** SHERRY AND ALAN LEVENTHAL FAMILY FDN

C/O BEACON CAPITAL

EIN: 26-3358768**Description****Amount**

NET DIFFERENCE BETWEEN REALIZED TAX AND GAAP BASIS GAIN, ON STOCK SOLD

742,237

TY 2017 Other Expenses Schedule

Name: SHERRY AND ALAN LEVENTHAL FAMILY FDN
C/O BEACON CAPITAL

EIN: 26-3358768

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FILING FEES	500	0		500

TY 2017 Other Notes/Loans Receivable Short Schedule**Name:** SHERRY AND ALAN LEVENTHAL FAMILY FDN

C/O BEACON CAPITAL

EIN: 26-3358768

Name of 501(c)(3) Organization	Balance Due
MURIEL & NORMAN B LEVENTHAL FAMILY FOUNDATION INC	0

TY 2017 Other Professional Fees Schedule

Name: SHERRY AND ALAN LEVENTHAL FAMILY FDN
C/O BEACON CAPITAL

EIN: 26-3358768

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
RIDGEWAY ADVISORS, LLC PHILANTHROPIC ADVISORS	15,188	0		13,163
INVESTMENT MANAGEMENT FEES	7,481	7,481		0

**TY 2017 Substantial Contributors
Schedule**

Name: SHERRY AND ALAN LEVENTHAL FAMILY FDN
C/O BEACON CAPITAL

EIN: 26-3358768

Name	Address
ALAN M LEVENTHAL	200 STATE STREET 5TH FLOOR BOSTON, MA 02109

TY 2017 Taxes Schedule

Name: SHERRY AND ALAN LEVENTHAL FAMILY FDN
C/O BEACON CAPITAL

EIN: 26-3358768

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL EXCISE TAXES	7,409	0		0

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990	OMB No 1545-0047 2017
	Name of the organization SHERRY AND ALAN LEVENTHAL FAMILY FDN C/O BEACON CAPITAL	Employer identification number 26-3358768

Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

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

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

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

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Part I Contributors (See instructions) Use duplicate copies of Part I if additional space is needed			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ALAN M LEVENTHAL 200 STATE STREET BOSTON, MA 02109	\$ 1,992,544	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
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Part II **Noncash Property** (See instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	VARIOUS SECURITIES	\$ 1,992,544	2018-05-01
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	

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C/O BEACON CAPITAL**Employer identification number**

26-3358768

Part III	Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$ _____ Use duplicate copies of Part III if additional space is needed
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(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	