

C&E
927

Form 990-PF

Department of the Treasury
Internal Revenue Service

EXTENDED TO AUGUST 15, 2019

2949105700216 9

OMB No 1545-0052

Return of Private Foundation

1809

2017

Open to Public Inspection

► Do not enter social security numbers on this form as it may be made public.
► Go to www.irs.gov/Form990PF for instructions and the latest information.

For calendar year 2017 or tax year beginning

OCT 1, 2017

, and ending

SEP 30, 2018

Name of foundation SHERBORN WIDOWS AND ORPHANS BENEVOLENT SOCIETY, C/O JUDITH MULDOON		A Employer identification number 04-6035480																																																																																																																																																																																					
Number and street (or P O box number if mail is not delivered to street address) 11 MAPLE STREET		B Telephone number 508-655-4209																																																																																																																																																																																					
City or town, state or province, country, and ZIP or foreign postal code SHERBORN, MA 01770		C If exemption application is pending check here ► <input type="checkbox"/>																																																																																																																																																																																					
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1 Foreign organizations, check here ► <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation ► <input type="checkbox"/>																																																																																																																																																																																					
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ► <input type="checkbox"/>																																																																																																																																																																																					
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ► \$ 433,101.	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ► <input type="checkbox"/>																																																																																																																																																																																					
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))																																																																																																																																																																																							
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STATEMENT 1	4 Dividends and interest from securities	10,737.	10,737.	10,737.	STATEMENT 2	5a Gross rents					b Net rental income or (loss)					6a Net gain or (loss) from sale of assets not on line 10 Gross sales price for all assets on line 6a	32,419.	-989.			7 Capital gain net income (from Part IV, line 2)		0.			8 Net short-term capital gain					9 Income modifications Gross sales less returns and allowances					10a					b Less Cost of goods sold					c Gross profit or (loss)					11 Other income					12 Total Add lines 1 through 11	12,556.	11,045.	11,045.		13 Compensation of officers, directors, trustees, etc	0.	0.	0.	0.	14 Other employee salaries and wages					15 Pension plans, employee benefits					16a Legal fees					b Accounting fees	STMT 3	1,680.	840.	1,680.	c Other professional fees	STMT 4	2,083.	2,083.	2,083.	17 Interest					18 Taxes	STMT 5	1,470.	293.	293.	19 Depreciation and depletion		368.	0.	368.	20 Occupancy					21 Travel, conferences, and meetings					22 Printing and publications					23 Other expenses	STMT 6	35.	0.	0.	24 Total operating and administrative expenses. 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SHERBORN WIDOWS AND ORPHANS

BENEVOLENT SOCIETY, C/O JUDITH MULDOON

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing		1.	1.
	2	Savings and temporary cash investments	15,532.	23,551.	23,551.
	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			
	7	Other notes and loans receivable ►			
		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			
	b	Investments - corporate stock	371,958.	408,263.	408,263.
	c	Investments - corporate bonds	25,215.	0.	0.
	11	Investments - land, buildings, and equipment basis ►			
		Less accumulated depreciation ►			
	12	Investments - mortgage loans			
	13	Investments - other			
	14	Land, buildings, and equipment: basis ►	1,838.		
		Less accumulated depreciation	STMT 9 ► 552.	1,654.	1,286.
	15	Other assets (describe ►)			
	16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		414,359.	433,101.
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			
	22	Other liabilities (describe ►)			
	23	Total liabilities (add lines 17 through 22)		0.	0.
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ► <input checked="" type="checkbox"/> and complete lines 24 through 26, and lines 30 and 31.				
	24	Unrestricted		414,359.	433,101.
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ► <input type="checkbox"/> 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		414,359.	433,101.
	31	Total liabilities and net assets/fund balances		414,359.	433,101.

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	414,359.
2	Enter amount from Part I, line 27a	2	-15,483.
3	Other increases not included in line 2 (itemize) ►	3	34,225.
4	Add lines 1, 2, and 3	4	433,101.
5	Decreases not included in line 2 (itemize) ►	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	433,101.

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SHERBORN WIDOWS AND ORPHANS

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BENEVOLENT SOCIETY, C/O JUDITH MULDOON

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, 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 MANUFACTURER & TRASERS BOND				VARIOUS	12/04/17
b 50 SHS IBM				VARIOUS	04/23/18
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 25,000.		25,000.		0.	
b 7,419.		8,408.		-989.	
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.				(I) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
a				0.	
b				-989.	
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	-989.	
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). If (loss), enter -0- in Part I, line 8	{ If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8}		3	0.	

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 doesn't qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2016	30,572.	397,171.	.076974
2015	23,307.	382,462.	.060939
2014			
2013			
2012			

2 Total of line 1, column (d)

2 .137913

3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years

3 .068957

4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5

4 412,667.

5 Multiply line 4 by line 3

5 28,456.

6 Enter 1% of net investment income (1% of Part I, line 27b)

6 78.

7 Add lines 5 and 6

7 28,534.

8 Enter qualifying distributions from Part XII, line 4

8 22,403.

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.

SHERBORN WIDOWS AND ORPHANS

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BENEVOLENT SOCIETY, C/O JUDITH MULDOON

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ► <input type="checkbox"/> and enter "N/A" on line 1.	Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)	1	157.
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► <input type="checkbox"/> and enter 1% of Part I, line 27b			
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)			
3	Add lines 1 and 2	2	0.	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	3	157.	
5	Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-	4	0.	
6	Credits/Payments:	5	157.	
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	600.	
b	Exempt foreign organizations - tax withheld at source	6b	0.	
c	Tax paid with application for extension of time to file (Form 8868)	6c	0.	
d	Backup withholding erroneously withheld	6d	0.	
7	Total credits and payments. Add lines 6a through 6d	7	600.	
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	0.	
9	Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10	Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	443.	
11	Enter the amount of line 10 to be: Credited to 2018 estimated tax ► <input type="checkbox"/> Refunded ► <input type="checkbox"/>	11	0.	

Part VII-A Statements Regarding Activities

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? Yes No
 1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the 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 Yes No
 1c Did the foundation file Form 1120-POL for this year? Yes No
 1d 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.
 1e 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? Yes No
 If "Yes," attach a detailed description of the activities Yes 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 Yes No
 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? Yes No
 b If "Yes," has it filed a tax return on Form 990-T for this year? Yes No
 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? Yes No
 If "Yes," attach the statement required by *General Instruction T* Yes No
 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:
 • By language in the governing instrument, or Yes No
 • 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? Yes No
 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 Yes No

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 Yes No
 9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the tax year beginning in 2017? See the instructions for Part XIV. If "Yes," complete Part XIV Yes No
 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses Yes No

N/A

	Yes	No
1a		X
1b		X
1c		X
2	X	
3		X
4a		X
4b		
5		X
6		X
7	X	
8b	X	
9		X
10		X

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**SHERBORN WIDOWS AND ORPHANS
BENEVOLENT SOCIETY, C/O JUDITH MULDOON**

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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	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
14	The books are in care of ► JUDITH MULDOON Located at ► 11 MAPLE STREET, SHERBORN, MA	Telephone no. ► 508-655-4209 ZIP+4 ► 01770
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 <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
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 the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
(6)	Agree to pay money or property to a government official? (Exception Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, check here	N/A ► <input type="checkbox"/>
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 <input checked="" type="checkbox"/>
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? If "Yes," list the years ► _____, _____, _____, _____, _____	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
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)	N/A 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. ► _____, _____, _____, _____	
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
b	If "Yes," did it have excess business holdings in 2017 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2017.)	N/A 3b
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a <input checked="" type="checkbox"/>
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 <input checked="" type="checkbox"/>

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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))?
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?
- (3) Provide a grant to an individual for travel, study, or other similar purposes?
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

b If any answer is "Yes" to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions

Organizations relying on a current notice regarding disaster assistance, check here

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

N/A

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

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, and foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
PLEASE SEE ATTACHED	0.00	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

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

►

0

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Part VIII | Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

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

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 FINANCIAL ASSISTANCE PROVIDED TO 18 INDIGENT INDIVIDUALS/FAMILIES RESIDENT OR STRONGLY CONNECTED TO THE TOWN OF SHERBORN, MA		21,904.
2 MATERIAL ASSISTANCE TO APPROXIMATELY 122 INDIVIDUALS SIMILARLY SITUATED TO THOSE IN LINE 1		
3		
4		

Part IX-B | Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

Amount

1 N/A		
2		
All other program-related investments. See instructions.		
3		
Total. Add lines 1 through 3	►	0.

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[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:

1a		394,686.
1b		24,265.
1c		
1d		418,951.
	1e	0.
2		0.
3		418,951.
4		6,284.
5		412,667.
6		20,633.

a Average monthly fair market value of securities
b Average of monthly cash balances
c Fair market value of all other assets
d **Total** (add lines 1a, b, and c)
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)

2 Acquisition indebtedness applicable to line 1 assets
3 Subtract line 2 from line 1d
4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)
5 **Net value of noncharitable-use assets** Subtract line 4 from line 3. Enter here and on Part V, line 4
6 **Minimum investment return** Enter 5% of line 5

[Part XI] Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here ► and do not complete this part.)

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

	1	20,633.
2a	157.	
2b		
2c		157.
3		20,476.
4		0.
5		20,476.
6		0.
7		20,476.

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

1a		22,403.
1b		0.
2		
3a		
3b		
4		22,403.
5		0.
6		22,403.

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.

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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				20,476.
2 Undistributed income, if any, as of the end of 2017			0.	
a Enter amount for 2016 only				
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2017:				
a From 2012				
b From 2013				
c From 2014				
d From 2015	4,301.			
e From 2016	11,859.			
f Total of lines 3a through e	16,160.			
4 Qualifying distributions for 2017 from Part XII, line 4: ► \$ 22,403.			0.	
a Applied to 2016, but not more than line 2a				
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				20,476.
e Remaining amount distributed out of corpus	1,927.			
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	18,087.			
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 instr.				0.
f Undistributed income for 2017. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018				
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	0.			
9 Excess distributions carryover to 2018				
Subtract lines 7 and 8 from line 6a	18,087.			
10 Analysis of line 9:				
a Excess from 2013				
b Excess from 2014				
c Excess from 2015	4,301.			
d Excess from 2016	11,859.			
e Excess from 2017	1,927.			

**SHERBORN WIDOWS AND ORPHANS
BENEVOLENT SOCIETY, C/O JUDITH MULDOON**

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Part XV Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<i>a Paid during the year</i>				
PLEASE SEE ATTACHED SCHEDULE	NONE	N/A	PLEASE SEE ATTACHED SCHEDULE	22,403.
Total			► 3a	22,403.
<i>b Approved for future payment</i>				
NONE				
Total			► 3b	0.

Form 990-PF (2017)

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

	Unrelated business income		Excluded by section 512, 513 or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclu- sion 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					
4 Dividends and interest from securities			14	308.	
5 Net rental income or (loss) from real estate:			14	10,737.	
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			18	-989.	
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.		10,056.	0.
13 Total Add line 12, columns (b), (d), and (e)				13	10,056.
(See worksheet in line 13 instructions to verify calculations)					

Relationship of Activities to the Accomplishment of Exempt Purposes

Sherborn Widows and Orphans Benevolent Society. 04-6035480

Form 990, Part VIII - attachment

Officers & Directors (none salaried; no compensation, etc.) Hours average approximately 1 hour per week.

Clare Graham President
208 South Main Street
Sherborn, MA 01770

Kate Potter Vice President
4 Snow Street
Sherborn, MA 01770

Mimi Krier Director
42 Forest Street
Sherborn, MA 01770

Deb Boyce Secretary
173 South Main Street
Sherborn, MA 01770

Judith Muldoon Treasurer
11 Maple Street
Sherborn, MA 01770

Nancy Hess Asst Treasurer
64 South Main Street
Sherborn, MA 01770

Carole Marple Director
8 Stoney Brook Road
Sherborn, MA 01770

Elizabeth Yon Director
116 Maple Street
Sherborn, MA 01770

Ruth Stewart Director
40 Maple Street
Sherborn, MA 01770

Tate Sakiyama Director
83 Nason Hill Road
Sherborn, MA 01770

Phyllis Braun Director
190 Western Avenue
Sherborn, MA 01770

Sarah O'Connell Director
17 Goulding Street
Sherborn, MA 01770

Rosemary Sortor Director
33 Old Orchard Rd
Sherborn, MA 01770

Janet Walsh Director
10 Wood Road
Sherborn, MA 01770

Sally Tipton Director
22 Farm Road
Sherborn, MA 01770

Ani Giganjian Director
169 South Main Street
Sherborn, MA 01770

Panny Nichols Director
1 Pleasant Street
Sherborn, MA 01770

Sherborn Widows and Orphans Benevolent
Society. 04-6035480

Form 990, Part VIII - attachment

Officers & Directors (none salaried; no
compensation, etc.) Hours average
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Sherborn, MA 01770

Panny Nichols Director
1 Pleasant Street
Sherborn, MA 01770

ATTACHMENT DETAIL FOR FORM 990-PF

PART XV, LINE 3a

(i) The Society paid a total of \$21,904.31 to 18 indigent persons/families (an average of \$1,217).

Of this total, ten individuals/families received amounts in excess of \$1,000. *Solely in order to protect the privacy and safety of these individuals, and not in any attempt to frustrate the filing of a complete and accurate return, these individuals are identified below by alphabetical code.* Full particulars will be made available to the Internal Revenue Service upon request

<u>Individual</u>	<u>Total Gift</u>
K1	\$ 3,300
E2	\$ 250
B2	\$ 1,200
T1	\$ 1,500
T	\$ 1,270
A	\$ 2,200
L	\$ 1,100
S1	\$ 500
B	\$ 319
A1	\$ 427
W1	\$ 2,035
C	\$ 614
B1	\$ 700
D	\$ 600
D	\$ 989
E	\$ 2,700
S	\$ 250
F	\$ 1,200
G	\$ 1,000

(ii) In addition, gifts of flowers, plants or fruit valued at \$499 in total were made to approximately 122 indigent persons, with the objective of gladdening hearts

TOTAL of (i) and (ii) \$ 22,653

Reconciling item (\$250)

TOTAL \$ 22,403

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	NET	(B) INVESTMENT INCOME	(C) ADJUSTED NET INCOME
FIDELITY CASH	308.		308.	308.
TOTAL TO PART I, LINE 3	308.		308.	308.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
FIDELITY BROKERAGE - NOMINEE CORP DIV	10,737.	0.	10,737.	10,737.	10,737.
TO PART I, LINE 4	10,737.	0.	10,737.	10,737.	10,737.

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTANTS FEES	1,680.	840.	1,680.	0.
TO FORM 990-PF, PG 1, LN 16B	1,680.	840.	1,680.	0.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	2,083.	2,083.	2,083.	0.
TO FORM 990-PF, PG 1, LN 16C	2,083.	2,083.	2,083.	0.

SHERBORN WIDOWS AND ORPHANS BENEVOLENT S

04-6035480

FORM 990-PF

TAXES

STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES PAID	293.	293.	293.	0.
FEDERAL EXCISE TAXES	1,177.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 18	1,470.	293.	293.	0.

FORM 990-PF

OTHER EXPENSES

STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
POSTAGE	35.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 23	35.	0.	0.	0.

FORM 990-PF

OTHER INCREASES IN NET ASSETS OR FUND BALANCES

STATEMENT 7

DESCRIPTION

AMOUNT

UNREALIZED HOLDING GAINS (LOSSES)	34,224.
FRACTIONS	1.

TOTAL TO FORM 990-PF, PART III, LINE 3

34,225.

FORM 990-PF

CORPORATE STOCK

STATEMENT 8

DESCRIPTION

FAIR MARKET
BOOK VALUE VALUE

CORPORATE STOCKS

408,263. 408,263.

TOTAL TO FORM 990-PF, PART II, LINE 10B

408,263. 408,263.

STATEMENT(S) 5, 6, 7, 8

FORM 990-PF DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT STATEMENT 9

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
COMPUTER	1,838.	552.	1,286.
TOTAL TO FM 990-PF, PART II, LN 14	1,838.	552.	1,286.

2017 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1

990-066

728111 04-01-17

(D) - Asset disposed

*ITC. Salvage Bonus Commercial Revitalization Deduction GO Zone