

2017

Open to Public Inspection

Form 990-PF

Department of the Treasury
Internal Revenue ServiceReturn of Private Foundation
or Section 4947(a)(1) Trust Treated as Private Foundation

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

For calendar year 2017 or tax year beginning 10/01, 2017, and ending 9/30, 2018

HAROLD S COLEMAN & MARIAN B COLEMAN
CHARITABLE FOUNDATION INC.
2 OLD APPLE TREE TRAIL
PLYMOUTH, MA 02360

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name change

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

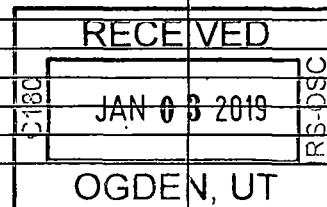
I Fair market value of all assets at end of year (from Part II, column (c), line 16)
\$ 298,610.
J Accounting method: ☒ Cash ☐ Accrual
☐ Other (specify) (Part I, column (d) must be on cash basis.)

A Employer identification number
13-6115668
B Telephone number (see instructions)
508 209-0908
C If exemption application is pending, check here ☐
D 1 Foreign organizations, check here ☐
2 Foreign organizations meeting the 85% test, check here and attach computation ☐
E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received (attach schedule).				
2	Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	6,336.	6,336.	6,336.	
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	-20,126.			
b	Gross sales price for all assets on line 6a 16,044.				
7	Capital gain net income (from Part IV, line 2)		0.		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
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	-13,790.	6,336.	6,336.	
13	Compensation of officers, directors, trustees, etc.	0.			
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule)				
b	Accounting fees (attach sch) See St 1	1,800.			1,800.
c	Other professional fees (attach sch)				
17	Interest				
18	Taxes (attach schedule)(see instrs.)				
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses (attach schedule) See Statement 2	3,569.			3,569.
24	Total operating and administrative expenses. Add lines 13 through 23	5,369.			5,369.
25	Contributions, gifts, grants paid Part XV	45,070.			45,070.
26	Total expenses and disbursements. Add lines 24 and 25	50,439.	0.	0.	50,439.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	-64,229.			
b	Net investment income (if negative, enter -0-)		6,336.		
c	Adjusted net income (if negative, enter -0-)			6,336.	

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REVENUE

ADMINISTRATIVE
AND
OPERATING
EXPENSES

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	6,787.	2,437.	2,437.
	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 sch) ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments — U.S. and state government obligations (attach schedule)			
	b Investments — corporate stock (attach schedule) Statement 3	201,053.	227,482.	293,573.
	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 ▶ See Statement 4)	20,737.	2,600.	2,600.	
16 Total assets (to be completed by all filers — see the instructions. Also, see page 1, item I)	228,577.	232,519.	298,610.	
LIABILITIES	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
FUND ASSETS	Foundations that follow SFAS 117, check here and complete lines 24 through 26, and lines 30 and 31. <input checked="" type="checkbox"/>			
	24 Unrestricted	228,577.	232,519.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input type="checkbox"/>			
	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)	228,577.	232,519.	
	31 Total liabilities and net assets/fund balances (see instructions)	228,577.	232,519.	

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	228,577.
2 Enter amount from Part I, line 27a	2	-64,229.
3 Other increases not included in line 2 (itemize) ▶ See Statement 5	3	68,171.
4 Add lines 1, 2, and 3	4	232,519.
5 Decreases not included in line 2 (itemize) ▶	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	232,519.

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 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
1 a 1250 GENERAL ELECTRIC		P	Various	3/28/18
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a 16,044.		36,170.	-20,126.
b			
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			-20,126.
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div>	2	-20,126.
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	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 8, column (c). See instructions. If (loss), enter -0- in Part I, line 8 </div>	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	12,496.	280,670.	0.044522
2015	14,472.	265,463.	0.054516
2014	14,160.	275,750.	0.051351
2013	12,182.	266,111.	0.045778
2012	11,080.	227,863.	0.048626

2 Total of line 1, column (d)	2	0.244793
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	0.048959
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5.	4	288,428.
5 Multiply line 4 by line 3	5	14,121.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	63.
7 Add lines 5 and 6	7	14,184.
8 Enter qualifying distributions from Part XII, line 4	8	50,439.

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)

1 a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter 'N/A' on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary – see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here. <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	63.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 1% 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	63.
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	63.
6	Credits/Payments:		
a	2017 estimated tax pmts and 2016 overpayment credited to 2017	6 a	
b	Exempt foreign organizations – tax withheld at source	6 b	
c	Tax paid with application for extension of time to file (Form 8868)	6 c	
d	Backup withholding erroneously withheld	6 d	
7	Total credits and payments. Add lines 6a through 6d.	7	0.
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	63.
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be: Credited to 2018 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11	

Part VII Statements Regarding Activities

	Yes	No
1 a 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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition		X
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		
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 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.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If 'Yes,' attach the statement required by General Instruction T		X
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?		X
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	X	
8 a Enter the states to which the foundation reports or with which it is registered. See instructions NY		
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	X	
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		X
10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

	Yes	No
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	X
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	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>N/A</u>	13	X
14 The books are in care of <u>CAROL KAUFMAN</u> Telephone no <u>508 209-0908</u> Located at <u>2 OLD APPLE TREE TRAIL PLYMOUTH MA</u> ZIP + 4 <u>02360</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here <u>N/A</u> and enter the amount of tax-exempt interest received or accrued during the year <u>15</u> <u>N/A</u>		
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	16	X

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

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

	Yes	No
1 a During the year, did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <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 <input type="checkbox"/>	1 b	N/A
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?	1 c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If 'Yes,' list the years <u>20</u> <u>20</u> <u>20</u> <u>20</u>		
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)	2 b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <u>20</u> <u>20</u> <u>20</u> <u>20</u>		
3 a 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.)	3 b	N/A
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	X
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?	4 b	X

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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))?

☐ 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

5 b N/A

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?...N/A ☐ Yes ☐ No

If 'Yes,' attach the statement required by Regulations section 53.4945–5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6 b X

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?☐ Yes ☒ No**b** If 'Yes,' did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7 b

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. See instructions.

(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
CAROL KAUFMAN 2 OLD APPLE TREE TRAIL PLYMOUTH, MA 02360	President 0	0.	0.	0.
LISA KAUFMAN 74 DONALD STREET WEYMOUTH, MA 02188	Vice Preside 0	0.	0.	0.
LAURIE KAUFMAN MILLER 6 BRAMBLEWOOD STREET BRIDGEWATER, MA 02324	Treasurer 0	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	(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

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	1 a	273,255.
b	Average of monthly cash balances	1 b	2,284.
c	Fair market value of all other assets (see instructions)	1 c	17,281.
d	Total (add lines 1a, b, and c)	1 d	292,820.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1 e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	292,820.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	4,392.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	288,428.
6	Minimum investment return. Enter 5% of line 5	6	14,421.

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	14,421.
2a	Tax on investment income for 2017 from Part VI, line 5	2 a	63.
b	Income tax for 2017. (This does not include the tax from Part VI.)	2 b	
c	Add lines 2a and 2b	2 c	63.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	14,358.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	14,358.
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	14,358.

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	1 a	50,439.
b	Program-related investments — total from Part IX-B	1 b	
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)	3 a	
b	Cash distribution test (attach the required schedule)	3 b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	50,439.
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	63.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	50,376.

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				14,358.
2 Undistributed income, if any, as of the end of 2017:				
a Enter amount for 2016 only			1,391.	
b Total for prior years: 20____, 20____, 20____		0.		
3 Excess distributions carryover, if any, to 2017:				
a From 2012				
b From 2013				
c From 2014				
d From 2015				
e From 2016				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2017 from Part XII, line 4: \$ 50,439.				
a Applied to 2016, but not more than line 2a			1,391.	
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				14,358.
e Remaining amount distributed out of corpus	34,690.			
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	34,690.			
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)	0.			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	34,690.			
10 Analysis of line 9:				
a Excess from 2013				
b Excess from 2014				
c Excess from 2015				
d Excess from 2016				
e Excess from 2017	34,690.			

BAA

Form 990-PF (2017)

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 Paid during the year See Statement 7				
Total			3 a	45,070.
b Approved for future payment				
Total			3 b	

Part XVI-A Analysis of Income-Producing Activities

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) 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			14		
4	Dividends and interest from securities			14		6,336.
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					-20,126.
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)					-13,790.
13	Total. Add line 12, columns (b), (d), and (e)					-13,790.

(See worksheet in line 13 instructions to verify calculations.)

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

[illegible]

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CHARITABLE FOUNDATION INC

Client 1

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Statement 1
Form 990-PF, Part I, Line 16b
Accounting Fees

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
	\$ 1,800.			\$ 1,800.
Total	\$ 1,800.	\$ 0.	\$ 0.	\$ 1,800.

Statement 2
Form 990-PF, Part I, Line 23
Other Expenses

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
INSURANCE	\$ 117.			\$ 117.
NY FILING FEE	50.			50.
POSTAGE	181.			181.
STORAGE	3,221.			3,221.
Total	\$ 3,569.	\$ 0.	\$ 0.	\$ 3,569.

Statement 3
Form 990-PF, Part II, Line 10b
Investments - Corporate Stocks

Corporate Stocks	Valuation Method	Book Value	Fair Market Value
SCHEDULE ATTACHED	Cost	\$ 227,482.	\$ 293,573.
	Total	\$ 227,482.	\$ 293,573.

Statement 4
Form 990-PF, Part II, Line 15
Other Assets

	Book Value	Fair Market Value
INVESTMENT IN ART	\$ 2,600.	\$ 2,600.
Total	\$ 2,600.	\$ 2,600.

Statement 5
Form 990-PF, Part III, Line 3
Other Increases

Net Unrealized Gains or Losses on Investments	Total	\$ 68,171.
		\$ 68,171.

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Statement 6
Form 990-PF, Part XV, Line 2a-d
Application Submission Information

Name of Grant Program:

Name: HAROLD S COLEMAN & MARIAN B COLEMAN FDTN

Care Of: CAROL KAUFNAN

Street Address: 2 OLD APPLE TREE TRAIL

City, State, Zip Code: PLYMOUTH, MA 02360

Telephone: 508 209-0908

E-Mail Address:

Form and Content: N/A

Submission Deadlines: N/A

Restrictions on Awards: N/A

Statement 7
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
AMNESTY INTERNATIONAL P.O. BOX 98233 WASHINGTON DC 20077	NONE		TO SUPPORT CHARITABLE PURPOSES	\$ 100.
DOUGLASS COLLEGE 181 RYDERS LANE NEW BRUNSWICK NJ 08901	NONE		TO SUPPORT CHARITABLE PURPOSES	100.
HYACINTH AIDS FOUNDATION 317 GEORGE STREET NEW BRUNSWICK NJ 08901	NONE		TO SUPPORT CHARITABLE PURPOSES	100.
ARBOR DAY FOUNDATION 211 N. 12TH STREET LINCOLN NE 68503	NONE		TO SUPPORT CHARITABLE PURPOSES	100.
PROJECT BREAD PO BOX 4134 WOBURN MA 01888	NONE		TO AUPPORT CHARITABLE PURPOSES	150.
WORLD WILDLIFE FUND PO BOX 96555 WASHINGTON DC 20077	NONE		TO SUPPORT CHARITABLE PURPOSES	50.
FEED THE CHILDREN PO BOX 97067 WASHINGTON DC 20077	NONE		TO SUPPORT CHARITABLE PURPOSES	100.
NATL RESOURCES DEFENSE COUNCIL PO BOX 1830 MERRIFIELD VA 22116	NONE		TO SUPPORT CHARITABLE PURPOSES	100.

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Statement 7 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
NCJW ESSEX COUNTY 70 SO ORANGE AVE SUITE 120 LIVINGSTON NJ 07039	NONE		TO SUPPORT CHARITABLE PURPOSES	\$ 100.
MAKE A WISH FOUNDATION PO BOX 97104 WASHINGTON DC 20090	NONE		TO SUPPORT CHARITABLE PURPOSES	100.
INTERNATIONAL RESCUE COMMITTEE PO BOX 6068 ALBERT LEA NW 56007	NONE		TO SUPPORT CHARITABLE PURPOSES	200.
DOCTORS WITHOUT BOARDERS PO BOX 5022 HAGERSTOWN MD 21741	NONE		TO SUPPORT CHARITABLE PURPOSES	100.
DEFENDERS OF WILDLIFE PO BOX 1553 MERRIFIELD VA 22116	NONE		TO SUPPORT CHARITABLE PURPOSES	75.
HUMAN RIGHTS WATCH PO BOX 4803 TOMS RIVER NJ 08754	NONE		TO SUPPORT CHARITABLE PURPOSES	70.
AMERICAN FARMLAND TRUST PO BOX 96982 WASHINGTON DC 20077	NONE		TO SUPPORT CHARITABLE PURPOSES	100.
AMERICAN ASSOC. OF UNIVERSITY WOMEN PO BOX 96974 WASHINGTON DC 20090	NONE		TO SUPPORT CHARITABLE PURPOSES	75.
CRANBURY HOSPICE 36 CORDAGE PARK CIRCLE SUITE 326 PLYMOUTH MA 02360	NONE		TO SUPPORT CHARITABLE PURPOSES	25.
ENVIRONMENTAL DEFENSE FUND PO BOX 5055 HAGERSTOWN MD 21741	NONE		TO SUPPORT CHARITABLE PURPOSES	150.
CORPORATE ACCOUNTABILITY PO BOX 416 LEWISTON ME 04243	NONE		TO SUPPORT CHARITABLE PURPOSES	75.
NOW FOUNDATION PO BOX 1848 MERRIFIELD VA 22116	NONE		TO SUPPORT CHARITABLE PURPOSES	100.

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Statement 7 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
UNION OF CONCERNED SCIENTISTS PO BOX 4123 WOBURN MA 01888	NONE		TO SUPPORT CHARITABLE PURPOSES	\$ 100.
HERITAGE MUSEUM & GARDENS 67 GRAND STREET SANDWICH MA 02563	NONE		TO SUPPORT CHARITABLE PURPOSES	125.
MASS AUDOBON SOCIETY 208 SO GREAT ROAD PO BOX 9102 LINCOLN MA 01773	NONE		TO SUPPORT CHARITABLE PURPOSES	100.
NAACP PO BOX 64983 BALTIMORE MD 21264	NONE		TO SUPPORT CHARITABLE PURPOSES	75.
NATIONAL PARKS CONSERVATION ASSOC. PO BOX 97202 WASHINGTON DC 20077	NONE		TO SUPPORT CHARITABLE PURPOSES	100.
NATIONAL WILDLIFE FEDERATION PO BOX 1582 MERRIFIELD VA 22116	NONE		TO SUPPORT CHARITABLE PURPOSES	100.
THE NATURE CONSERVANCY PO BOX 1561 MERRIFIELD VA 22116	NONE		TO SUPPORT CHARITABLE PURPOSES	125.
SCENIC HUDSON ONE CIVIC CENTER PLAZA SUITE 200 POUGHKEEPSIE NY 12601	NONE		TO SUPPORT CHARITABLE PURPOSES	100.
ADIRONDACK COUNCIL PO BOX D-2 ELIZABETHTOWN NY 12932	NONE		TO SUPPORT CHARITABLE PURPOSES	50.
ARBOR DAY FOUNDATION 211 N 12TH STREET LINCOLN NE 68508	NONE		TO SUPPORT CHARITABLE PURPOSES	100.
RAILS TO TRAILS CONSERVANCY 2121 WARD COURT NW 5TH FLOOR WASHINGTON DC 20070	NONE		TO SUPPORT CHARITABLE PURPOSES	50.

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Statement 7 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
MFA PO BOX 98079 WASHINGTON DC 20090	NONE		TO SUPPORT CHARITABLE PURPOSES	\$ 115.
HOSPICE PALLIATIVE CARE, 47 PARK AVE WEST ORANGE NJ 07052	NONE		TO SUPPORT CHARITABLE PURPOSES	50.
ST BONAVENTURE FUND FOR THE NEEDY PO BOX 996 MANOMET MA 02345	NONE		TO SUPPORT CHARITABLE PURPOSES	100.
NATIONAL TRUST FOR HISTORIC PRESERVATION PO BOX 5043 HAGERSTOWN PA 21741	NONE		TO SUPPORT CHARITABLE PURPOSES	100.
PMC JIMMY FUND 77 FOURTH AVE NEEDHAM MA 02494	NONE		TO SUPPORT CHARITABLE PURPOSES	50.
WILDLANDS TRUST 675 LONG POND ROAD PLYMOUTH MA 02360	NONE		TO SUPPORT CHARITABLE PURPOSES	100.
NATURAL RESOURCES DEFENSE COUNCIL PO BOX 1830 MERRIFIELD VA 22116	NONE		TO SUPPORT CHARITABLE PURPOSES	200.
PEOPLE FOR THE AMERICAN WAY 1101 15TH ST NW 6TH FLOOR WASHINGTON DC 20077	NONE		TO SUPPORT CHARITABLE PURPOSES	125.
DEFENDERS OF WILDLIFE PO BOX 1553 MERRIFIELD VA 22116	NONE		TO SUPPORT CHARITABLE PURPOSES	75.
90.9 WBUR PO BOX 9235 CHELSEA MA 02150	NONE		TO SUPPORT CHARITABLE PURPOSES	35.
WCAI PO BOX 96464 WASHINGTON DC 20090	NONE		TO SUPPORT CHARITABLE PURPOSES	50.
WATERKEEPER ALLIANCE PO BOX 96464 WASHINGTON DC 20090	NONE		TO SUPPORT CHARITABLE PURPOSES	100.

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Statement 7 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
PMC JIMMY FUND 77 FOURTH AVENUE NEEDHAM MA 02494	NONE		TO SUPPORT CHARITABLE PURPOSES	\$ 500.
NATIVE AMERICAN RIGHTS FUND PO BOX 992 BOULDER CO 80306	NONE		TO SUPPORT CHARITABLE PURPOSES	50.
RED CLOUD INDIAN SCHOOL 100 MISSOURI DRIVE PINE RIDGE SD 57770	NONE		TO SUPPORT CHARITABLE PURPOSES	100.
THE PUCCINI SOCIETY OF DALLAS PO BOX 25105 DALLAS TX 75225	NONE		TO SUPPORT CHARITABLE PURPOSES	100.
THE TRUST FOR PUBLIC LAND PO BOX 96315 WASHINGTON DC 20090	NONE		TO SUPPORT CHARITABLE PURPOSES	50.
FEEDING AMERICA PO BOX 96749 WASHINGTON DC 20090	NONE		TO SUPPORT CHARITABLE PURPOSES	100.
CORP ACCOUNTABILITY PO BOX 416 LEWISTON ME 04243	NONE		TO SUPPORT CHARITABLE PURPOSES	75.
RUTGERS UNIVERSITY FOUNDATION 335 GEORGE STREET LIBERTY PLAZA NEW BRUNSWICK NJ 08901	NONE		TO SUPPORT CHARITABLE PURPOSES	40,000.

Total \$ 45,070.