

Form **990-PF**Department of the Treasury  
Internal Revenue Service**Return 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](http://www.irs.gov/Form990PF) for instructions and the latest information.

OMB No 1545-0052

**2018**

Open to Public Inspection

For calendar year 2018 or tax year beginning

, and ending

Name of foundation

**The Lynch Family Charitable Foundation  
John H. Lynch**

A Employer identification number

**01-0561381**

Number and street (or P O box number if mail is not delivered to street address)

**2 Watchtower Road**

Room/suite

B Telephone number

**603-626-2233**

City or town, state or province, country, and ZIP or foreign postal code

**Hopkinton, NH 03229**C If exemption application is pending, check here ☐ **10**

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeD 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 foundationE 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)

J Accounting method:

☒ Cash☐ Accrual☐ Other (specify) \_\_\_\_\_F If the foundation is in a 60-month termination  
under section 507(b)(1)(B), check here ☐▶ \$ **3,257,020.** (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).)(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			N/A	
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	4,182.	4,182.		Statement 1
	4 Dividends and interest from securities	51,632.	51,632.		Statement 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	279,562.			
	b Gross sales price for all assets on line 6a	1,104,467.			
	7 Capital gain net income (from Part IV, line 2)		279,562.		
	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)					
11 Other income					
12 Total Add lines 1 through 11	335,376.	335,376.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees Stmt 3	5,335.	2,667.		2,667.
	c Other professional fees Stmt 4	20,359.	20,359.		0.
	17 Interest				
	18 Taxes Stmt 5	783.	783.		0.
	19 Depreciation and depletion				
	20 Occupancy	11,000.	2,750.		8,250.
	21 Travel, conferences, and meetings				
	22 Printing and publications				
23 Other expenses Stmt 6	111.	36.		75.	
24 Total operating and administrative					

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The Lynch Family Charitable Foundation

Form 990-PF (2018)

John H. Lynch

01-0561381

Page 3

**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,  
common stock, bonds, etc.)

(b) How acquired  
P - Purchase

(c) Date acquired  
(mm. day. yr.)

(d) Date sold  
(mm. day. yr.)

The Lynch Family Charitable Foundation  
John H. Lynch

Form 990-PF (2018)

01-0561381 Page 4

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	6,176.
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	6,176.
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	6,176.
6 Credits/Payments:			
a 2018 estimated tax payments and 2017 overpayment credited to 2018	6a	4,651.	
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	4,651.	
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	1,525.	
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 2019 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11		

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b 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.		X
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
4a 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?		
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	

N/A

8a Enter the states to which the foundation reports or with which it is registered. See instructions.

**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

Yes No

**1a Publicly Traded Securities****b Capital Gains Dividends**

<b>c</b>			
<b>d</b>			
<b>e</b>			

(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))
<b>a</b> 1,104,172.		824,905.	279,267.
<b>b</b> 295.			295.
<b>c</b>			
<b>d</b>			
<b>e</b>			

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

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
<b>a</b>			279,267.
<b>b</b>			295.
<b>c</b>			
<b>d</b>			
<b>e</b>			

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

279,562.

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

3

N/A

The Lynch Family Charitable Foundation

Form 990-PF (2018)

John H. Lynch

01-0561381

Page 6

**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

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?

If "Yes" to 6b, file Form 8870.

6b

X

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

7b

8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?

☐ Yes ☒ No

**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
John H. Lynch	Trustee			
2 Watchtower Road				
Hopkinton, NH 03229	1.00	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

Form 990-PF (2018)

**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."**

[illegible]

**Total number of others receiving over \$50,000 for professional services**

<b>Part IX-A</b>	<b>Summary of Direct Charitable Activities</b>
------------------	------------------------------------------------

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.

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

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.

Form **990-PF** (2018)

**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	3,217,059.
b	Average of monthly cash balances	1b	315,146.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	3,532,205.
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	3,532,205.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	52,983.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3,479,222.
6	Minimum investment return. Enter 5% of line 5	6	173,961.

**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	173,961.
2a	Tax on investment income for 2018 from Part VI, line 5	2a	6,176.
b	Income tax for 2018. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	6,176.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	167,785.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	167,785.
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	167,785.

**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	149,392.
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	149,392.
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	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	149,392.

**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.



The Lynch Family Charitable Foundation  
John H. Lynch

Form 990-PF (2018)

01-0561381

Page 9

**Part XIII** Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				167,785.
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only			129,431.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2018:				
a From 2013				
b From 2014				
c From 2015				
d From 2016				
e From 2017				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2018 from Part XII, line 4: ▶ \$ 149,392.				
a Applied to 2017, but not more than line 2a			129,431.	
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 2018 distributable amount				19,961.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2018 (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:	0.			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
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 2017. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019				147,824.
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 2013 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2014				
b Excess from 2015				
c Excess from 2016				
d Excess from 2017				
e Excess from 2018				



The Lynch Family Charitable Foundation  
John H. Lynch

01-0561381

**Part XV. Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

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
Concord Community Music School 23 Wall Street Concord, NH 03301	N/A	PC	General Operating Support	1,000.
Concord Hospital Trust 250 Pleasant Street Concord, NH 03301	N/A	SO I	General Operating Support	500.
Concord Public Library Foundation of Concord, NH P.O. Box 3957 Concord, NH 03302	N/A	PC	General Operating Support	100.
Currier Museum 150 Ash Street Manchester, NH 03104	N/A	PC	General Operating Support	2,000.
For Inspiration and Recognition of Science and Technology (FIRST) 200 Bedford Street Manchester, NH 03101	N/A	PC	General Operating Support	4,000.
Friends of Bridges House P.O. Box 3967 Concord, NH 03302	N/A	PC	General Operating Support	13,000.
Friends of the Hopkinton Town Library 61 Houston Drive Contoocook, NH 03229	N/A	PC	General Operating Support	200.
Geisel School of Medicine at Dartmouth College 1 Rope Ferry Road Hanover, NH 03755	N/A	PC	General Operating Support	5,000.
Harvard Business School 139A Charles Street, 392 Boston, MA 02114	N/A	PC	General Operating Support	20,000.
Hopkinton Historical Society 300 Main Street Hopkinton, NH 03229	N/A	PC	General Operating Support	100.
<b>Total from continuation sheets</b>				<b>100,400.</b>

The Lynch Family Charitable Foundation  
John H. Lynch

01-0561381

**Part XV Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

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
Indians for Collective Action 3838 Mumford Plaza Palo Alto, CA 94306	N/A	PC	General Operating Support	300.
Jimmy Fund (Dana Farber Cancer Institute) 10 Brookline Place West, 6th Floor Boston, MA 02215	N/A	PC	General Operating Support	500.
Mount Holyoke College 50 College Street South Hadley, MA 01075	N/A	PC	General Operating Support	10,000.
MSPCA - Angell 350 S. Huntington Avenue Boston, MA 02130	N/A	PC	General Operating Support	100.
New Hampshire Charitable Foundation 37 Pleasant Street Concord, NH 03301	N/A	PC	General Operating Support	11,000.
New Hampshire Legal Assistance 117 N. State Street Concord, NH 03301	N/A	PC	General Operating Support	100.
Palace Theatre 80 Hanover Street Manchester, NH 03101	N/A	PC	General Operating Support	4,000.
Pan Massachusetts Challenge Trust 77 Fourth Ave Needham, MA 02494	N/A	PC	General Operating Support	500.
Pope Memorial SPCA of Concord Merrimack County 94 Silk Farm Road Concord, NH 03301	N/A	PC	General Operating Support	5,000.
Saint George Greek Orthodox Cathedral 650 Hanover Street Manchester, NH 03104	N/A	PC	General Operating Support	1,000.
Total from continuation sheets				

The Lynch Family Charitable Foundation  
John H. Lynch

01-0561381

**Part XV** Supplementary Information

**3 Grants and Contributions Paid During the Year (Continuation)**

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
St. Jude Children's Research Hospital 262 Danny Thomas Place Memphis, TN 38105	N/A	PC	General Operating Support	4,000.
Town of Hopkinton 330 Main Street Hopkinton, NH 03229	N/A	GOV	General Operating Support	500.
Trustees of Dartmouth College 100 Tuck Hall Hanover, NH 03755	N/A	PC	Tuck School of Business	1,000.
University of Massachusetts Medical School 55 Lake Avenue North Worcester, MA 01655	N/A	GOV	General Operating Support	10,000.
University of New Hampshire 9 Edgewood Drive Durham, NH 03824	N/A	GOV	General Operating Support	5,000.
Waypoint (Formerly Child & Family Services) 464 Chestnut Street Manchester, NH 03101	N/A	PC	General Operating Support	1,000.
Weare Animal Guardians (WAG) P.O. Box 572 Weare, NH 03281	N/A	PC	General Operating Support	500.
Total from continuation sheets				

The Lynch Family Charitable Foundation

John H. Lynch

01-0561381 Page 11

Form 990-PF (2018)

**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)				
<b>a Paid during the year</b>				
Boys & Girls Club of Manchester 555 Union Street Manchester, NH 03104	N/A	PC	General Operating Support	2,000.
Boys & Girls Club of Nashua 1 Positive Place Nashua, NH 03060	N/A	PC	General Operating Support	1,000.
Boys & Girls Club of Souhegan Valley 56 Mount Vernon Street Milford, NH 03055	N/A	PC	General Operating Support	20,000.
City of Concord, Parks & Recreation Department 41 Green Street Concord, NH 03301	N/A	GOV	To Help Fund the Skate House at White Park	5,000.
Concord Coalition to End Homelessness P.O. Box 3933 Concord, NH 03302	N/A	PC	General Operating Support	10,000.
<b>Total</b>	<b>See continuation sheet(s)</b>			<b>138,400.</b>
<b>b Approved for future payment</b>				
None				
<b>Total</b>				<b>0.</b>

Form 990-PF (2018)

## Enter gross amounts unless otherwise indicated

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).
---------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

[illegible]



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

- |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                    |       |     |    |                                                                            |       |  |                                                                                                                    |  |     |    |  |  |  |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|-------|-----|----|----------------------------------------------------------------------------|-------|--|--------------------------------------------------------------------------------------------------------------------|--|-----|----|--|--|--|
| <p><b>1</b> Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c)(3) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?</p> <p><b>a</b> Transfers from the reporting foundation to a noncharitable exempt organization of:</p> <p>(1) Cash</p> <p>(2) Other assets</p> <p><b>b</b> Other transactions</p> <p>(1) Sales of assets to a noncharitable exempt organization</p> <p>(2) Purchases of assets from a noncharitable exempt organization</p> <p>(3) Rental of facilities, equipment, or other assets</p> <p>(4) Reimbursement arrangements</p> <p>(5) Loans or loan guarantees</p> <p>(6) Performance of services or membership or fundraising solicitations</p> <p><b>c</b> Sharing of facilities, equipment, mailing lists, other assets, or paid employees</p> <p><b>d</b> If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.</p> | <table border="1"> <tr> <td></td> <td>Yes</td> <td>No</td> </tr> <tr> <td></td> <td></td> <td></td> </tr> </table> |       | Yes | No |                                                                            |       |  | <table border="1"> <tr> <td></td> <td>Yes</td> <td>No</td> </tr> <tr> <td></td> <td></td> <td></td> </tr> </table> |  | Yes | No |  |  |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Yes                                                                                                                | No    |     |    |                                                                            |       |  |                                                                                                                    |  |     |    |  |  |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                    |       |     |    |                                                                            |       |  |                                                                                                                    |  |     |    |  |  |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Yes                                                                                                                | No    |     |    |                                                                            |       |  |                                                                                                                    |  |     |    |  |  |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                    |       |     |    |                                                                            |       |  |                                                                                                                    |  |     |    |  |  |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <table border="1"> <tr> <td>1a(1)</td> <td></td> <td>X</td> </tr> </table>                                         | 1a(1) |     | X  | <table border="1"> <tr> <td>1a(1)</td> <td></td> <td>X</td> </tr> </table> | 1a(1) |  | X                                                                                                                  |  |     |    |  |  |  |
| 1a(1)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                    | X     |     |    |                                                                            |       |  |                                                                                                                    |  |     |    |  |  |  |
| 1a(1)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                    | X     |     |    |                                                                            |       |  |                                                                                                                    |  |     |    |  |  |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <table border="1"> <tr> <td>1a(2)</td> <td></td> <td>X</td> </tr> </table>                                         | 1a(2) |     | X  | <table border="1"> <tr> <td>1a(2)</td> <td></td> <td>X</td> </tr> </table> | 1a(2) |  | X                                                                                                                  |  |     |    |  |  |  |
| 1a(2)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                    | X     |     |    |                                                                            |       |  |                                                                                                                    |  |     |    |  |  |  |
| 1a(2)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                    | X     |     |    |                                                                            |       |  |                                                                                                                    |  |     |    |  |  |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <table border="1"> <tr> <td>1b(1)</td> <td></td> <td>X</td> </tr> </table>                                         | 1b(1) |     | X  | <table border="1"> <tr> <td>1b(1)</td> <td></td> <td>X</td> </tr> </table> | 1b(1) |  | X                                                                                                                  |  |     |    |  |  |  |
| 1b(1)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                    | X     |     |    |                                                                            |       |  |                                                                                                                    |  |     |    |  |  |  |
| 1b(1)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                    | X     |     |    |                                                                            |       |  |                                                                                                                    |  |     |    |  |  |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <table border="1"> <tr> <td>1b(2)</td> <td></td> <td>X</td> </tr> </table>                                         | 1b(2) |     | X  | <table border="1"> <tr> <td>1b(2)</td> <td></td> <td>X</td> </tr> </table> | 1b(2) |  | X                                                                                                                  |  |     |    |  |  |  |
| 1b(2)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                    | X     |     |    |                                                                            |       |  |                                                                                                                    |  |     |    |  |  |  |
| 1b(2)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                    | X     |     |    |                                                                            |       |  |                                                                                                                    |  |     |    |  |  |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <table border="1"> <tr> <td>1b(3)</td> <td></td> <td>X</td> </tr> </table>                                         | 1b(3) |     | X  | <table border="1"> <tr> <td>1b(3)</td> <td></td> <td>X</td> </tr> </table> | 1b(3) |  | X                                                                                                                  |  |     |    |  |  |  |
| 1b(3)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                    | X     |     |    |                                                                            |       |  |                                                                                                                    |  |     |    |  |  |  |
| 1b(3)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                    | X     |     |    |                                                                            |       |  |                                                                                                                    |  |     |    |  |  |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <table border="1"> <tr> <td>1b(4)</td> <td></td> <td>X</td> </tr> </table>                                         | 1b(4) |     | X  | <table border="1"> <tr> <td>1b(4)</td> <td></td> <td>X</td> </tr> </table> | 1b(4) |  | X                                                                                                                  |  |     |    |  |  |  |
| 1b(4)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                    | X     |     |    |                                                                            |       |  |                                                                                                                    |  |     |    |  |  |  |
| 1b(4)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                    | X     |     |    |                                                                            |       |  |                                                                                                                    |  |     |    |  |  |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <table border="1"> <tr> <td>1b(5)</td> <td></td> <td>X</td> </tr> </table>                                         | 1b(5) |     | X  | <table border="1"> <tr> <td>1b(5)</td> <td></td> <td>X</td> </tr> </table> | 1b(5) |  | X                                                                                                                  |  |     |    |  |  |  |
| 1b(5)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                    | X     |     |    |                                                                            |       |  |                                                                                                                    |  |     |    |  |  |  |
| 1b(5)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                    | X     |     |    |                                                                            |       |  |                                                                                                                    |  |     |    |  |  |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <table border="1"> <tr> <td>1b(6)</td> <td></td> <td>X</td> </tr> </table>                                         | 1b(6) |     | X  | <table border="1"> <tr> <td>1b(6)</td> <td></td> <td>X</td> </tr> </table> | 1b(6) |  | X                                                                                                                  |  |     |    |  |  |  |
| 1b(6)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                    | X     |     |    |                                                                            |       |  |                                                                                                                    |  |     |    |  |  |  |
| 1b(6)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                    | X     |     |    |                                                                            |       |  |                                                                                                                    |  |     |    |  |  |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <table border="1"> <tr> <td>1c</td> <td></td> <td>X</td> </tr> </table>                                            | 1c    |     | X  | <table border="1"> <tr> <td>1c</td> <td></td> <td>X</td> </tr> </table>    | 1c    |  | X                                                                                                                  |  |     |    |  |  |  |
| 1c                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                                                    | X     |     |    |                                                                            |       |  |                                                                                                                    |  |     |    |  |  |  |
| 1c                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                                                    | X     |     |    |                                                                            |       |  |                                                                                                                    |  |     |    |  |  |  |

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No
- b** If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

<b>Sign Here</b>	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.					May the IRS discuss this return with the preparer shown below? See instr. <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
	 Signature of officer or trustee		3/9/19 Date	Trustee Title			
<b>Paid Preparer Use Only</b>	Print/Type preparer's name		Preparer's signature		Date	Check <input type="checkbox"/> if self-employed	PTIN
	Nicholas E. Porto				02/20/19		P01310283
	Firm's name ▶ BAKER NEWMAN & NOYES, LLC					Firm's EIN ▶ 02-0383073	
	Firm's address ▶ 650 ELM STREET, SUITE 302 MANCHESTER, NH 03101					Phone no. (800) 244-7444	

Form **990-PF** (2018)



## Form 990-PF Interest on Savings and Temporary Cash Investments Statement 1

Source	(a) Revenue Per Books	(b) Net Investment Income	(c) Adjusted Net Income
Interest Income	4,182.	4,182.	
Total to Part I, line 3	4,182.	4,182.	

## 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
Investment Int & Divs	51,927.	295.	51,632.	51,632.	
To Part I, line 4	51,927.	295.	51,632.	51,632.	

## Form 990-PF Accounting Fees Statement 3

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Accounting & Tax Services	5,335.	2,668.		2,667.
To Form 990-PF, Pg 1, ln 16b	5,335.	2,668.		2,667.

## 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 - Goldman Sachs	20,359.	20,359.		0.
To Form 990-PF, Pg 1, ln 16c	20,359.	20,359.		0.

Form 990-PF	Taxes			Statement	5
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Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Foreign Taxes	783.	783.		0.
To Form 990-PF, Pg 1, ln 18	783.	783.		0.

Form 990-PF	Other Expenses			Statement	6
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Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Bank Fees	36.	36.		0.
NH Filing Fees	75.	0.		75.
To Form 990-PF, Pg 1, ln 23	111.	36.		75.

Form 990-PF	U.S. and State/City Government Obligations		Statement	7
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Description	U.S. Gov't	Other Gov't	Book Value	Fair Market Value
Fixed Income - Statement 10	X		620,944.	620,944.
Total U.S. Government Obligations			620,944.	620,944.
Total State and Municipal Government Obligations				
Total to Form 990-PF, Part II, line 10a			620,944.	620,944.

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Form 990-PF	Corporate Stock	Statement	8
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Description	Book Value	Fair Market Value
Equity - Statement 10	1,925,803.	1,925,803.
Total to Form 990-PF, Part II, line 10b	1,925,803.	1,925,803.

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Form 990-PF	Corporate Bonds	Statement	9
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Description	Book Value	Fair Market Value
Other Investments - Statement 10	343,042.	343,042.
Total to Form 990-PF, Part II, line 10c	343,042.	343,042.

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