















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	192,673	161,425	161,425
	2 Savings and temporary cash investments	663,805	304,439	304,439
	3 Accounts receivable ▶ <u>18,470</u>			
	Less allowance for doubtful accounts ▶ _____	22,983	18,470	18,470
	4 Pledges receivable ▶ _____			
	Less allowance for doubtful accounts ▶ _____			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ _____			
	Less allowance for doubtful accounts ▶ _____			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	4,288	4,426	4,426
	10a Investments—U S and state government obligations (attach schedule)	701,699 	1,209,616	1,208,692
	b Investments—corporate stock (attach schedule)	6,649,416 	6,886,982	7,569,069
	c Investments—corporate bonds (attach schedule)	1,975,679 	1,861,986	1,799,595
	11 Investments—land, buildings, and equipment basis ▶ _____			
Less accumulated depreciation (attach schedule) ▶ _____				
12 Investments—mortgage loans				
13 Investments—other (attach schedule)	334,379 	308,677	290,037	
14 Land, buildings, and equipment basis ▶ <u>13,155</u>				
Less accumulated depreciation (attach schedule) ▶ <u>3,407</u>	1,718 	9,748	9,748	
15 Other assets (describe ▶ _____)	 1,441,448 	 1,200,207 	 1,200,207	
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	11,988,088	11,965,976	12,566,108	
Liabilities	17 Accounts payable and accrued expenses	22,693	48,654	
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)		95,332	
	22 Other liabilities (describe ▶ _____)	 27,480 	 112,315	
	23 Total liabilities (add lines 17 through 22)	50,173	256,301	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	10,971,294	10,873,789	
	25 Temporarily restricted			
	26 Permanently restricted	966,621	835,886	
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg , and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see instructions)	11,937,915	11,709,675	
31 Total liabilities and net assets/fund balances (see instructions) .	11,988,088	11,965,976		

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	11,937,915
2 Enter amount from Part I, line 27a	2	-97,505
3 Other increases not included in line 2 (itemize) ▶ _____	3	0
4 Add lines 1, 2, and 3	4	11,840,410
5 Decreases not included in line 2 (itemize) ▶ _____ 	5	130,735
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	11,709,675

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a PUBLICLY TRADED SECURITIES			
b CAPITAL GAINS DIVIDENDS	P		
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 2,152,268		1,941,065	211,203
b 9,098			9,098
c			
d			
e			

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

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			211,203
b			9,098
c			
d			
e			

2 Capital gain net income or (net capital loss)	2	220,301
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	2,893

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes
 ☐ No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2017			
2016			
2015			
2014			
2013			

2 Total of line 1, column (d)	2	
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	
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	
5 Multiply line 4 by line 3	5	
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	
7 Add lines 5 and 6	7	
8 Enter qualifying distributions from Part XII, line 4	8	

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input checked="" type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter <u>1997-10-22</u> (attach copy of letter if necessary—see instructions)	1	N/A
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)	2	
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		
3	Add lines 1 and 2.	3	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	0
6	Credits/Payments	6a	0
a	2018 estimated tax payments and 2017 overpayment credited to 2018		
b	Exempt foreign organizations—tax withheld at source		
c	Tax paid with application for extension of time to file (Form 8868)		
d	Backup withholding erroneously withheld		
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	0
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed ▶	9	0
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 ▶ Refunded ▶	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ \$ <u>0</u> (2) On foundation managers ▶ \$ <u>0</u>		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ <u>0</u>		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	2	No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>	5	No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ MA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i> .	8b	Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the taxable year beginning in 2018? See the instructions for Part XIV. <i>If "Yes," complete Part XIV</i>	9	Yes
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11	Yes	
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions.	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address WWW.MASONWRIGHTFOUNDATION.ORG	13	Yes	
14	The books are in care of ALAN T. POPP Telephone no (413) 733-1517			

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15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year 15		
16	At any time during calendar year 2018, 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	Yes No

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

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

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <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 checked="" type="checkbox"/> Yes <input 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"/>	1b		No
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 2018?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? If "Yes," list the years ▶ 20____, 20____, 20____, 20____ <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2018 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 2018).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?	4b		No

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

5a	During the year did the foundation pay or incur any amount to		Yes	No
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions.		5b	
	Organizations relying on a current notice regarding disaster assistance check here.	<input type="checkbox"/>		
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?	<input type="checkbox"/> Yes <input type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	6b	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			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	7b	
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?			
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 during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions				
(a) Name and address	(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
See Additional Data Table				
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
JANINE KENT	FINANCE DIRECTOR	108,443	0	4,929
74 WALNUT STREET SPRINGFIELD, MA 01105	40 00			
EILEEN DRUMM-MOORE	EXECUTIVE DIRECTOR	104,232	0	6,518
74 WALNUT STREET SPRINGFIELD, MA 01105	40 00			
DEBORAH MAXTON	AGENCY DIRECTOR	86,748	0	8,687
74 WALNUT STREET SPRINGFIELD, MA 01105	40 00			
LAURA SCHMIEDING	ACCOUNTANT	56,804	0	19,000
74 WALNUT STREET SPRINGFIELD, MA 01105	40 00			
Total number of other employees paid over \$50,000.				0

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

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

[illegible]

Total number of others receiving over \$50,000 for professional services.	0
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Part IX-A Summary of Direct Charitable Activities

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

1	PROVIDING OPERATING MANAGEMENT SERVICES TO AN ASSISTED AND INDEPENDENT LIVING RETIREMENT COMMUNITY, A HOME CARE AGENCY, AND AN EARLY EDUCATION CENTER	427,475
2		
3		
4		

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

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

Total. Add lines 1 through 3													0
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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	11,976,148
b	Average of monthly cash balances.	1b	67,063
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	12,043,211
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	12,043,211
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	180,648
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	11,862,563
6	Minimum investment return. Enter 5% of line 5.	6	593,128

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

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	556,678
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	556,678
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	556,678

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 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only.				
b Total for prior years 20____, 20____, 20____				
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.				
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ _____				
a Applied to 2017, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2018 distributable amount.				
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2017 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2018 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2019				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions).				
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a				
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.				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2018, enter the date of the ruling. 1997-10-22

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

	Tax year	Prior 3 years			(e) Total
	(a) 2018	(b) 2017	(c) 2016	(d) 2015	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	211,838	268,898	274,981	320,637	1,076,354
b 85% of line 2a	180,062	228,563	233,734	272,541	914,901
c Qualifying distributions from Part XII, line 4 for each year listed	556,678	480,271	532,628	443,932	2,013,509
d Amounts included in line 2c not used directly for active conduct of exempt activities	0	0	62,575	0	62,575
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c	556,678	480,271	470,053	443,932	1,950,934
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					0
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					0
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.	395,419	369,006	339,737	341,651	1,445,813
c "Support" alternative test—enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					0
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					0
(3) Largest amount of support from an exempt organization					0
(4) Gross investment income					0

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

1 Information Regarding Foundation Managers:

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

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

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

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

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

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

c Any submission deadlines

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

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> MASON WRIGHT SENIOR LIVING 74 WALNUT STREET SPRINGFIELD, MA 01105		PC	THE ORGANIZATION PROVIDED FUNDING TO A RELATED ASSISTED LIVING FACILITY FOR OPERATIONS	137,810
Total			▶ 3a	
b <i>Approved for future payment</i>				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue						
a <u>MANAGEMENT FEES</u>						427,475
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments. . . .						
3 Interest on savings and temporary cash investments						
4 Dividends and interest from securities. . . .			14		282,034	
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			18		220,301	
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue						
a <u>OTHER INCOME</u>						3,000
b _____						
c _____						
d _____						
e _____						
12 Subtotal. Add columns (b), (d), and (e). . .			0		502,335	430,475
13 Total. Add line 12, columns (b), (d), and (e).				13		932,810

[illegible]

Part XVII

		Yes	No
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1a(1)	No
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1a(2)	No
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1b(1)	No
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1b(2)		No
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1b(3)		No
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1b(4)		No
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1b(5)		No
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1b(6)		No
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1c		No
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value
ue

[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

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.

<p>Sign Here</p> <p>*****</p> <hr/> <p>Signature of officer or trustee</p>	<p>2019-11-12</p> <hr/> <p>Date</p>	<p>*****</p> <hr/> <p>Title</p>
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May the IRS discuss this return with the preparer shown below

(see instr.)? ☒ **Yes** ☐ **No**

May the IRS discuss this return with the preparer shown below

(see instr)? ☒ Yes ☐ No

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed <input type="checkbox"/>	PTIN
	CONNIE M LIRA		2019-11-12		P00481097
	Firm's name ▶ CLIFTONLARSONALLEN LLP				Firm's EIN ▶ 41-0746749
	Firm's address ▶ 300 CROWN COLONY DRIVE SUITE 310 QUINCY, MA 02169				Phone no (617) 984-8100

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation				
(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
ALAN T POPP MS	PRESIDENT & CEO 50 00	190,015	0	19,559
74 WALNUT STREET SPRINGFIELD, MA 01105				
JOHN MORSE	CHAIR 1 00	0	0	0
74 WALNUT STREET SPRINGFIELD, MA 01105				
PAUL MARCHESE	VICE PRESIDENT 1 00	0	0	0
74 WALNUT STREET SPRINGFIELD, MA 01105				
ALLISON EBNER	SECRETARY 1 00	0	0	0
74 WALNUT STREET SPRINGFIELD, MA 01105				
BETH DESOUSA CPA	TRUSTEE 1 00	0	0	0
74 WALNUT STREET SPRINGFIELD, MA 01105				
MARY BETH DOWD	TRUSTEE 1 00	0	0	0
74 WALNUT STREET SPRINGFIELD, MA 01105				
SUSAN MCCOY ESQ	TRUSTEE 1 00	0	0	0
74 WALNUT STREET SPRINGFIELD, MA 01105				
SR EILEEN SULLIVAN	TRUSTEE 1 00	0	0	0
74 WALNUT STREET SPRINGFIELD, MA 01105				
JEFF SATTLER	TREASURER 1 00	0	0	0
74 WALNUT STREET SPRINGFIELD, MA 01105				
SABRINA WOODGETT	TRUSTEE 1 00	0	0	0
74 WALNUT STREET SPRINGFIELD, MA 01105				
MARK CRESS	TRUSTEE 1 00	0	0	0
74 WALNUT STREET SPRINGFIELD, MA 01105				
PAT GRENIER	TRUSTEE 1 00	0	0	0
74 WALNUT STREET SPRINGFIELD, MA 01105				
KATHI DONAHUE	TRUSTEE 1 00	0	0	0
74 WALNUT STREET SPRINGFIELD, MA 01105				

TY 2018 Accounting Fees Schedule**Name:** MASON WRIGHT FOUNDATION INC**EIN:** 04-2105936

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	48,410	0	0	50,210

TY 2018 General Explanation Attachment**Name:** MASON WRIGHT FOUNDATION INC**EIN:** 04-2105936**General Explanation Attachment**

Identifier	Return Reference	Explanation	
1	SCHEDULE OF CONTROLLED ENTITIES	FORM 990-PF, PART VII-A, LINE 11	NAME OF CONTROLLED ENTITY COLONY CARE SENIOR LIVING, INC EIN 45-4741875ADDRESS 74 WALNUT STREET, SPRINGFIELD, MA 01105EXCESS BUSINESS HOLDING NO NAME OF CONTROLLED ENTITY MASON WRIGHT SENIOR LIVING, INC EIN 47-1890506ADDRESS 74 WALNUT STREET, SPRINGFIELD, MA 01105EXCESS BUSINESS HOLDING NO NAME OF CONTROLLED ENTITY BRIGHT FUTURES EARLY LEARNING CENTER, INC EIN 82-1978704ADDRESS 74 WALNUT STREET, SPRINGFIELD, MA 01105EXCESS BUSINESS HOLDING NO

General Explanation Attachment

Identifier	Return Reference	Explanation	
2	TRANSFERS TO CONTROLLED ENTITIES	FORM 990-PF, PART VII-A, LINE 11	NAME OF CONTROLLED ENTITY BRIGHT FUTURES EARLY LEARNING CENTER, INC EIN 82-1978704ADDRESS 74 WALNUT STREET, SPRINGFIELD, MA 01105DESCRIPTION OF TRANSFER LOAN & NET ADVANCES, AMOUNT OF TRANSFER \$200,210 NAME OF CONTROLLED ENTITY MASON WRIGHT SENIOR LIVING, INC EIN 47-1890506ADDRESS 74 WALNUT STREET, SPRINGFIELD, MA 01105DESCRIPTION OF TRANSFER GRANT, AMOUNT OF TRANSFER \$137,810 DESCRIPTION OF TRANSFER LOAN, AMOUNT OF TRANSFER \$162 TOTAL TRANSFERS TO CONTROLLED ENTITIES \$338,182 NET LOANS & ADVANCES TOTAL TRANSFER \$200,372 NET GRANTS TOTAL TRANSFER \$137,810

General Explanation Attachment

Identifier	Return Reference	Explanation	
3	TRANSFERS FROM CONTROLLED ENTITIES	FORM 990-PF, PART VII-A, LINE 11	NAME OF CONTROLLED ENTITY BRIGHT FUTURE EARLY LEARNING CENTER, INC EIN 82-1978704ADDRESS 74 WALNUT STREET, SPRINGFIELD, MA 01105DESCRIPTION OF TRANSFER ADMINISTRATIVE FEE, AMOUNT OF TRANSFER \$12,000 NAME OF CONTROLLED ENTITY MASON WRIGHT SENIOR LIVING, INC EIN 47-1890506ADDRESS 74 WALNUT STREET, SPRINGFIELD, MA 01105DESCRIPTION OF TRANSFER NET ADVANCES, AMOUNT OF TRANSFER \$84,835 DESCRIPTION OF TRANSFER ADMINISTRATIVE FEE, AMOUNT OF TRANSFER \$239,891 NAME OF CONTROLLED ENTITY COLONY CARE SENIOR LIVING, INC EIN 45-4741875ADDRESS 74 WALNUT STREET, SPRINGFIELD, MA 01105DESCRIPTION OF TRANSFER NET ADVANCES, AMOUNT OF TRANSFER \$310,590 DESCRIPTION OF TRANSFER ADMINISTRATIVE FEE, AMOUNT OF TRANSFER \$175,584 DESCRIPTION OF TRANSFER GRANTS, AMOUNT OF TRANSFER \$55,500 TOTAL TRANSFERS FROM CONTROLLED ENTITIES \$878,400 NET ADVANCES TOTAL TRANSFER \$395,425 ADMINISTRATIVE FEE TOTAL TRANSFER \$427,475 GRANT TOTAL TRANSFER \$55,500

TY 2018 Investments Corporate Bonds Schedule

Name: MASON WRIGHT FOUNDATION INC

EIN: 04-2105936

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
FLOATING RATE	100,000	100,267
CALLABLE BOND	71,137	70,858
UNITEDHEALTH GROUP 2.875% 12/15/2021	60,938	59,806
CALLABLE BOND	30,000	29,441
2.750% 3/10/2022	74,777	73,588
CALLABLE BOND	75,404	74,365
4% 10/15/23	76,279	76,978
BP CAPITAL MARKETS 3.814% 2/10/2024	75,746	75,698
CALLABLE BOND	76,106	75,317
CITIGROUP INC 3.750% 6/16/2024	50,937	49,650
CALLABLE BOND	49,683	47,396
CALLABLE BOND	49,079	47,636
CALLABLE BOND	71,845	71,760
CALLABLE BOND	74,571	71,939
MORGAN STANLEY 4.000% 7/23/2025	77,113	73,991
8/1/2025	50,847	49,463
CALLABLE	50,429	47,653
DODGE & COX INCOME #147	28,777	27,585
FIDELITY FLOATING RATE HIGH INC #814	161,509	151,778
JP MORGAN CORE BOND SELECT #3720	64,291	62,368

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
PIMCO TOTAL RETURN INSTL #35	37,962	35,755
PIMCO HIGH YIELD INSTL #108	248,046	229,616
#56	54,569	51,165
VANGUARD GNMA ADMIRAL #536	151,941	145,522

TY 2018 Investments Corporate Stock Schedule

Name: MASON WRIGHT FOUNDATION INC
EIN: 04-2105936

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
#799	570,803	616,173
#436	112,932	87,028
GERSTEIN FISHER MULTI-FACTOR INTL GR	516,574	428,623
WISDOMTREE EUROPE HEDGED EQ FUND ETF	246,038	220,963
LINDE PC	25,989	24,810
ARCELORMITTAL SA ADR	7,083	5,519
AVERY DENNISON CORP	38,884	37,729
B A S F SE SPONSORED ADR	6,478	5,714
BHP GROUP PLC ADR	9,927	13,028
BERRY GLOBAL GROUP INC	21,344	20,676
CAVCO INDUSTRIES INC	20,970	20,600
ECOLAB INC	46,809	58,056
INTERNATIONAL PAPER CO	2,074	1,655
QUAKER CHEMICAL CORP	10,822	24,879
RPM INTERNATIONAL INC	38,385	48,964
ROYAL DSM NV ADR	8,443	8,881
TORAY INDS UNSPONSORED ADR	16,523	12,061
IHS MARKIT LTD	9,905	9,306
AERCAP HOLDINGS NV	12,556	11,326
ACS ACTIVIDADES CONS - UNS ADR	12,527	12,941
AIRBUS SE ADR	6,409	8,806
B A E SYSTEMS PLC ADR	14,959	11,767
BOEING CO	30,493	75,143
CATERPILLAR INC	13,698	11,945
EAGLE MATERIALS INC	14,527	8,788
EMERSON ELECTRIC CO	38,470	33,699
FORTIVE CORP	34,630	39,852
GARDNER DENVER HOLDINGS INC	28,362	18,712
GRACO INC	12,014	13,476
GRAINGER W W INC	9,514	16,377

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
HONEYWELL INTL INC	63,386	88,785
ILLINOIS TOOL WORKS	57,346	48,776
KUBOTA CORP ADR	10,366	8,966
LINCOLN ELECTRIC HLDGS INC	17,100	16,007
LOCKHEED MARTIN CORPORATION	3,767	3,666
MIDDLEBY CORP	12,117	11,917
NORDSON CORP	15,625	23,631
RBC BEARINGS INC	16,469	34,610
RITCHIE BROS AUCTIONEERS	18,615	24,409
SCHNEIDER NATIONAL INC CL B	20,517	14,824
TORO CO	17,832	23,470
UNION PACIFIC CORP	54,290	50,454
UNITED PARCEL SVC INC CL B	24,733	21,652
WABTEC CORP	30,222	26,063
WASTE MANAGEMENT INC NEW	20,000	33,193
ROYAL CARIBBEAN CRUISES LTD	7,958	7,334
ALIBABA GROUP HLDG LTD SPONSORED ADR	1,044	959
AMAZON COM INC	90,805	108,142
APTARGROUP INC	12,508	17,591
BOOKINGS HOLDINGS INC	39,697	51,673
BURLINGTON STORES INC	15,965	47,500
CARTER'S INC	32,375	23,996
COMCAST CORP NEW CL A	27,873	24,244
CTRIP.COM INTERNATIONAL LTD ADR	9,755	9,931
DAIMLER AG ADR	11,019	9,767
DISNEY (WALT) COMPANY HOLDING CO	64,605	68,860
DORMAN PRODUCTS INC	17,447	31,327
FIVE BELOW INC	12,087	37,040
HEXCEL CORP NEW	28,380	22,879
HOME DEPOT INC	65,219	86,597

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
INDUSTRIA DE DISENO TEXTIL SA ADR	13,321	11,664
LITHIA MOTORS INC CLASS A	19,511	15,495
MCDONALDS CORP	35,958	61,617
MICHAELS COMPANIES INC	14,252	8,760
NIKE INC CL B	31,931	31,139
POLARIS INDS INC	18,173	13,419
POOL CORP	13,075	18,135
T J X COS INC	17,327	26,844
ANHEUSER BUSCH INBEV SA/NV	3,244	2,303
BJS RESTAURANTS INC	16,013	19,722
BRITISH AMERICAN TOBACCO PLC SPN ADR	23,542	10,769
CARLSBERG A/S -B- SPON ADR	7,776	7,724
CHIPOTLE MEXICAN GRILL INC	6,900	9,068
COCA COLA CO	24,626	26,421
COSTCO WHSL CORP NEW	36,588	53,372
DANONE SA ADR	11,186	10,561
KELLOGG CO	43,305	39,679
KIMBERLY CLARK CORP	10,927	9,799
MCCORMICK & CO INC NON VOTING	7,811	11,418
MONDELEZ INTERNATIONAL INC	27,074	27,340
PEPSICO INC	52,577	50,931
PHILIP MORRIS INTL INC	2,229	1,803
PRICESMART INC	26,556	18,203
PROCTER & GAMBLE CO	51,214	59,472
SEVEN & I HLDGS CO LTD ADR	12,177	12,947
TEXAS ROADHOUSE INC	29,886	27,462
YUM CHINA HOLDINGS INC	10,860	9,757
CALLON PETROLEUM CO	22,162	11,273
CHEVRON CORP	63,959	64,839
DRIL-QUIP INC	8,005	3,514

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
EOG RESOURCES INC	40,969	39,070
MARATHON PETE CORP	13,404	12,274
MATADOR RESOURCES CO	18,792	10,483
OGE ENERGY CORP	16,081	18,694
OCCIDENTAL PETROLEUM CORP	22,291	19,273
ONEOK INC NEW	26,764	22,821
PARSLEY ENERGY INC	23,607	11,665
PHILLIPS 66	5,534	4,997
PIONEER NAT RES CO	9,761	8,812
REPSOL YPF S A SPONSORED ADR	4,312	3,944
ROYAL DUTCH SHELL PLC SPON ADR B	13,464	14,505
SPONSORED ADR A	9,738	11,013
SCHLUMBERGER LIMITED	88,416	39,977
SUPERIOR ENERGY SVCS INC	17,933	1,822
TOTAL S A ADR	20,133	22,907
AON PLC	47,466	42,590
JAMES RIVER GROUP HOLDINGS LTD	30,406	27,222
CHUBB LTD	58,544	61,877
AIA GROUP LTD ADR	7,846	8,634
AMERICAN CAMPUS CMNTYS INC REIT	30,234	32,988
AMERICAN EXPRESS CO	9,344	9,437
ARTISAN PARTNERS ASSET MGMT INC	16,247	7,849
A X A ADR	11,966	10,261
B B & T CORP	23,025	23,046
BANCO SANTANDER S A ADR	7,568	5,699
BANK OF AMERICA CORP	64,361	54,627
BANKUNITED INC	19,634	16,407
BERKSHIRE HATHAWAY INC DEL CL B	34,218	47,370
BLACKROCK INC	65,659	71,886
CORESITE REALTY CORP REIT	19,121	14,829

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
DBS GROUP HLDGS ADR	4,821	6,952
DNB ASA-SPONSOR ADR	14,091	12,205
DEUTSCHE BOERSE ADR	22,801	24,402
EASTERLY GOVERNMENT PPTYS INC	41,613	30,905
COM	4,711	5,601
GLACIER BANCORP INC	16,141	20,365
HSBC HLDGS PLC ADR NEW	9,707	11,716
INTESA SANPAOLO ADR	11,710	10,112
JPMORGAN CHASE & CO	63,928	96,058
ADR	4,021	2,820
LLOYDS BANKING GROUP PLC ADR	15,071	10,552
MARKETAXESS HLDGS INC	15,549	50,080
METLIFE INC	43,883	40,116
MID-AMER APT CMNTYS INC REIT	19,890	25,648
NORDEA BANK ABP ADR	8,090	7,478
OTSUKA HLDGS CO LTD ADR	10,520	14,292
PNC FINANCIAL SERVICES GROUP	27,423	21,161
PHYSICIAN REIT	22,453	19,476
PINNACLE FINANCIAL PARTNERS INC	25,096	16,780
PROASSURANCE CORP	21,348	19,225
SCHWAB CHARLES CORP	8,283	8,348
SIGNATURE BK NEW YORK N Y	29,348	23,338
SPONSORED ADR	13,601	11,666
SUMMIT HOTEL PROPERTIES INC REIT	17,161	11,413
SUN CMNTYS INC REIT	17,443	26,750
TEXAS CAPITAL BANCSHARES INC	13,067	12,977
COM	16,144	21,589
WELLS FARGO & CO NEW	17,745	16,220
WESTERN ALLIANCE BANCORP	13,732	11,097
ZIONS BANCORP NA	36,826	31,085

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ALLERGAN PLC	28,099	19,113
JAZZ PHARMACEUTICALS PLC	11,924	10,165
MEDTRONIC PLC	63,307	77,225
STERIS PLC	20,344	37,611
ABBOTT LABS	43,400	68,063
ACADIA HEALTHCARE COMPANY INC	24,127	11,955
ALEXION PHARMACEUTICALS INC	11,047	8,178
AMGEN INC	7,978	9,539
AMNEAL PHARMACEUTICALS INC	9,647	8,186
BIO-RAD LABORATORIES INC	26,447	22,758
BIOMARIN PHARMACEUTICAL INC	2,040	1,958
BIOGEN INC	15,898	16,852
CATALENT INC	18,494	16,806
CELGENE CORP	18,438	8,909
DANAHER CORP	54,344	70,018
EDWARDS LIFESCIENCES CORP	43,093	44,419
ESSILOR INTERNATIONAL SA-UNSPON ADR	20,521	19,886
ICU MED INC	10,073	34,674
ISHARES NASDAQ BIOTECHNOLOGY ETF	52,422	47,829
JOHNSON & JOHNSON INC	59,293	72,526
LILLY ELI & CO	4,705	7,638
MERCK & CO INC NEW	12,932	18,644
NEUROCRNIE BIOSCIENCES INC	10,178	8,069
PFIZER INC	19,045	25,361
PREMIER INC CLASS A	27,218	32,868
REGENERON PHARMACEUTICALS	7,377	6,723
ROCHE HLDG LTD SPON ADR	17,282	16,234
SMITH & NEPHEW P L C SPON ADR NEW	12,950	14,055
THERMO FISHER SCIENTIFIC INC	43,469	72,060
UNITEDHEALTH GROUP INC	39,607	81,960

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
WEST PHARMACEUTICAL SVSC INC	16,551	34,311
ZOETIS INC	62,046	62,872
EQUINOX INC REIT	11,218	8,814
PUBLIC STORAGE INC REIT	13,213	10,728
AMERICAN ELECTRIC POWER INC	17,354	22,347
AMERICAN WTR WKS CO INC NEW	10,393	15,794
E.ON SE ADR	4,944	4,734
ENGIE SPONS ADR	10,609	11,755
NEXTERA ENERGY INC	43,858	63,444
PORTLAND GEN ELEC CO	19,662	20,953
A T & T INC	18,862	15,469
ORANGE ADR	13,536	14,101
VERIZON COMMUNICATIONS	20,308	19,452
ADOBE SYS INC	61,879	61,311
AKAMAI TECHNOLOGIES INC	8,752	11,422
ALPHABET INC CL C	47,803	77,671
ALPHABET INC CL A	44,572	63,743
ANSYS INC	9,673	17,010
APPLE INC	100,136	149,380
BAIDU INC ADR	11,736	8,247
BLACKBAUD INC	10,686	16,794
BOOZ ALLEN HAMILTON HOLDINGS	25,767	32,495
CK HUTCHISON HLDGS LTD ADR	10,363	8,617
CISCO SYSTEMS INC	48,232	75,004
COGNEX CORP	16,323	24,130
DEUTSCHE POST AG SPONSORED ADR	3,708	2,679
EPAM SYSTEMS INC	13,983	12,645
EXPONENT INC	16,533	42,799
FACEBOOK INC A	80,911	69,871
FANUC CORP ADR	17,147	15,407

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
FISERV INC	35,519	43,506
GARTNER GROUP INC	24,604	38,863
INTEL CORP	54,916	77,247
INTERNATIONAL BUSINESS MACHINES	14,426	10,230
MICROSOFT CORP	84,135	186,483
NUTANIX INC CL A	5,303	5,324
ORACLE CORPORATION	7,940	7,811
PALO ALTO NETWORKS INC	8,148	11,866
PAYCHEX INC	14,480	17,525
PAYPAL HOLDINGS INC	34,395	38,850
POWER INTEGRATIONS INC	12,959	14,757
QUALCOMM INC	7,774	7,854
RAPID7 INC	22,050	22,653
RED HAT INC	6,198	11,241
SS&C TECHNOLOGIES HLDGS INC	14,759	25,622
SAP SE ADR	16,005	14,037
SECOM LTD ADR	16,872	22,844
SILICON LABORATORIES INC	16,253	17,102
SPLUNK INC	4,364	4,823
TEXAS INSTRUMENTS	56,675	56,795
TYLER TECHNOLOGIES INC	14,775	27,316
ULTIMATE SOFTWARE GROUP INC	14,867	21,059
VISA INC CLASS A SHARES	52,910	92,226
VMWARE INC	2,773	4,114
WAGeworks INC	17,463	9,560
ZEBRA TECHNOLOGIES CORP CL A	17,478	36,464

TY 2018 Investments Government Obligations Schedule**Name:** MASON WRIGHT FOUNDATION INC**EIN:** 04-2105936**US Government Securities - End
of Year Book Value:**

1,209,616

**US Government Securities - End
of Year Fair Market Value:**

1,208,692

**State & Local Government
Securities - End of Year Book
Value:**

0

**State & Local Government
Securities - End of Year Fair
Market Value:**

0

TY 2018 Investments - Other Schedule**Name:** MASON WRIGHT FOUNDATION INC**EIN:** 04-2105936**Investments Other Schedule 2**

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
CALLABLE BOND	AT COST	77,616	73,971
6/3/2026	AT COST	50,460	48,827
WELLS FARGO 3.000% 10/23/2026	AT COST	24,942	23,143
GERSTEIN FISHER MLT-FTR GL RL EST SE	AT COST	155,659	144,096

**TY 2018 Land, Etc.
Schedule****Name:** MASON WRIGHT FOUNDATION INC**EIN:** 04-2105936

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
EQUIPMENT	13,155	3,407	9,748	9,748

TY 2018 Legal Fees Schedule**Name:** MASON WRIGHT FOUNDATION INC**EIN:** 04-2105936

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL	27,042	0	0	25,129

TY 2018 Other Assets Schedule**Name:** MASON WRIGHT FOUNDATION INC**EIN:** 04-2105936**Other Assets Schedule**

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
DUE FROM RELATED PARTY - DEMAND NOTE	390,885	126,408	126,408
DUE FROM RELATED PARTY - OTHER ADVANCES	83,942	125,598	125,598
BENEFICIAL INTEREST IN THIRD PARTY TRUSTS	966,621	948,201	948,201

TY 2018 Other Decreases Schedule

Name: MASON WRIGHT FOUNDATION INC
EIN: 04-2105936

Description	Amount
CHANGE IN BENEFICIAL INTERESTS IN THIRD PARTY TRUSTS	130,735

TY 2018 Other Expenses Schedule**Name:** MASON WRIGHT FOUNDATION INC**EIN:** 04-2105936**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OFFICE SUPPLIES	49,095	0	0	49,294
MISCELLANEOUS EXPENSES	8,955	0	0	8,955
ADVERTISING, MARKETING & BRANDING	8,430	0	0	8,430
INSURANCE	2,670	0	0	2,609
REPAIRS & MAINTENANCE	425	0	0	425
MISCELLANEOUS - BANK FEES	62	62	62	0

TY 2018 Other Income Schedule**Name:** MASON WRIGHT FOUNDATION INC**EIN:** 04-2105936**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
MANAGEMENT FEES	427,475		427,475
OTHER INCOME	3,000		3,000

TY 2018 Other Liabilities Schedule**Name:** MASON WRIGHT FOUNDATION INC**EIN:** 04-2105936

Description	Beginning of Year - Book Value	End of Year - Book Value
DUE TO RELATED PARTY - OTHER ADVANCES	27,480	112,315

TY 2018 Other Professional Fees Schedule**Name:** MASON WRIGHT FOUNDATION INC**EIN:** 04-2105936

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT FEES	72,912	72,912	72,912	0
CONSULTANTS	21,027	0	0	13,499

TY 2018 Taxes Schedule**Name:** MASON WRIGHT FOUNDATION INC**EIN:** 04-2105936

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
REAL ESTATE TAXES	2,842	0	0	2,842
FOREIGN TAXES PAID	3,115	3,115	3,115	0
PAYROLL TAXES	38,974	0	0	38,974