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Form 990-PF

Department of the Treasury  
Internal Revenue ServiceExtended to November 15, 2019  
**Return of Private Foundation**

OMB No. 1545-0052

► 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.

**2018**

Open to Public Inspection

For calendar year 2018 or tax year beginning

, and ending

Name of foundation <b>John C. and Eunice B. Morrison Charitable Foundation</b>	A Employer identification number <b>04-3310863</b>
Number and street (or P O box number if mail is not delivered to street address) <b>8 D. Sorgi, Tr., 6 Beacon Street</b>	Room/suite <b>#1010</b>
City or town, state or province, country, and ZIP or foreign postal code <b>Boston, MA 02108</b>	B Telephone number <b>(617)742-2150</b>
C If exemption application is pending, check here ► <input type="checkbox"/>	
D Foreign organizations listed here ► <input type="checkbox"/>	
E Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity	

Part II	Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing				
	2 Savings and temporary cash investments		469,378.	447,205.	447,205.
	3 Accounts receivable ►				
	Less: allowance for doubtful accounts ►				
	4 Pledges receivable ►				
	Less: allowance for doubtful accounts ►				
	5 Grants receivable				
	6 Receivables due from officers, directors, trustees, and other disqualified persons				
	7 Other notes and loans receivable ►				
	Less: allowance for doubtful accounts ►				
Liabilities	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges				
Equity	10a Investments - U.S. and state government obligations Stmt 6		1,022,912.	1,120,172.	1,135,945.
	b Investments - corporate stock Stmt 7		4,467,765.	4,531,180.	5,103,057.

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.

If "Yes," attach the statement required by *General Instruction T*.

6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:



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  X

12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions  12  X

13 Did the foundation comply with the public inspection requirements for its annual return and supporting documents?  13  X

	Yes	No
11		X
12		X

**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

e FNMA PL MA3147, 3%, Due 07/01/47	P	01/01/18	12/31/18
f FNMA PL MA3148, 3.5%, Due 10/01/47	P	01/01/18	12/31/18
g FNMA PL MA3211, 4%, Due 12/01/47	P	01/01/18	12/31/18
h FNMA PL MA3183, 4%, Due 11/01/47	P	01/01/18	12/31/18
i FNMA PL MA3239, 4%, Due 01/01/48	P	01/01/18	12/31/18
j FNMA PL MA3305, 3.5%, Due 03/01/48	P	01/01/18	12/31/18
k FNMA PL MA3306, 4%, Due 03/01/48	P	01/01/18	12/31/18
l FNMA PL MA3377, 3%, Due 05/01/48	P	01/01/18	12/31/18
m FNMA PL MA3385, 4.5%, Due 04/01/48	P	01/01/18	12/31/18
n FNMA PL MA3443, 4%, Due 07/01/48	P	01/01/18	12/31/18

**o Capital Gains Dividends**

(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 2,703.		2,703.	0.
b 3,459.		3,459.	0.
c 579.		579.	0.
d 340.		340.	0.
e 335.		335.	0.
f 602.		602.	0.
g 500.		500.	0.
h 387.		387.	0.
l 610.		610.	0.
l 370.		370.	0.
k 179.		179.	0.
l 174.		174.	0.
m 280.		280.	0.
n 160.		160.	0.
o 3,382.			3,382.

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

(l) Losses (from col. (h))  
Gains (excess of col. (h) gain over col. (k))

(i) Adjusted basis

(k) Excess of col. (i)

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

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

**(a) Name and address of each person paid more than \$50,000**

**(b) Type of service**

**(c) Compensation**

**NONE**

**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

b Average of monthly cash balances

c Fair market value of all other assets

d Total (add lines 1a, b, and c)

e Reduction claimed for blockage or other factors reported on lines 1a and

1c (attach detailed explanation)

1e	0.
----	----

1a 10,917,280.

1b 458,134.

1c

1d 11,375,414.

**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				546,905.
2 Undistributed income, if any, as of the end of 2018			0.	
a Enter amount for 2017 only				
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2018:				
a From 2013	612,214.			
b From 2014	42,416.			
c From 2015	62,385.			
d From 2016	68,610.			
e From 2017				
f Total of lines 3a through e	785,625.			
4 Qualifying distributions for 2018 from Part XII, line 4: ► \$ 479,522.			0.	
a Applied to 2017, but not more than line 2a				
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2018 distributable amount				479,522.
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))	67,383.			67,383.
6 Enter the net total of each column as indicated below:	718,242.			
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			0.	
g 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.			0.
8 Excess distributions carryover from 2013 not applied on line 5 or line 7				
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	544,831.			
10 Analysis of line 9:	173,411.			
a Excess from 2014	42,416.			
b Excess from 2015	62,385.			
c Excess from 2016	68,610.			
d Excess from 2017				
e Excess from 2018				



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**Part XV Supplementary Information (continued)**

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution **	Amount
<b>a Paid during the year</b>				
Food for the Poor P.O. Box 979005 <u>Coconut Creek, FL 33097-9005</u>	PUBLIC	501(c)(3)	Food Pantry - Supplies	10,000.
A Place to Turn Food Pantry 99 Hartford Street, No. 1 <u>Natick, MA 01760</u>	PUBLIC	501(c)(3)	Support	5,000.
Abington Food Pantry 127 No, Main Street <u>Abington, MA 02351</u>	PUBLIC	501(c)(3)	Supplies	5,000.
West Buddies 29 Main Street, Ste. 202 <u>Boston, MA 02129</u>	PUBLIC	501(c)(3)	Supplies	5,000.
Brantwood Camp P.O. Box 3350 <u>Peterborough, NH 03458</u>	PUBLIC	501(c)(3)	Funds to camps	2,500.
<b>Total</b>	<b>See continuation sheet(s)</b>			► 3a 474,000.
<b>b Approved for future payment</b>				
None				
<b>Total</b>				► 3b 0.

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## Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					390.
4 Dividends and interest from securities					
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					170.
8 Gain or (loss) from sales of assets other than inventory					
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		0.	780,202.
13 Total Add line 12, columns (b), (d), and (e)					780,202.

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

## **Relationship of Activities to the Accomplishment of Exempt Purposes**

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

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

**a Transfers from the reporting foundation to a noncharitable exempt organization of:**

**(1) Cash**

- (2) Other assets
- b** Other transactions:
  - (1) Sales of assets to a noncharitable exempt organization
  - (2) Purchases of assets from a noncharitable exempt organization
  - (3) Rental of facilities, equipment, or other assets
  - (4) Reimbursement arrangements
  - (5) Loans or loan guarantees
  - (6) Performance of services or membership or fundraising solicitation

**c Sharing of facilities, equipment, mailing lists, other assets, or paid employees**

d 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.

**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		

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge

May the IRS disagree? ■

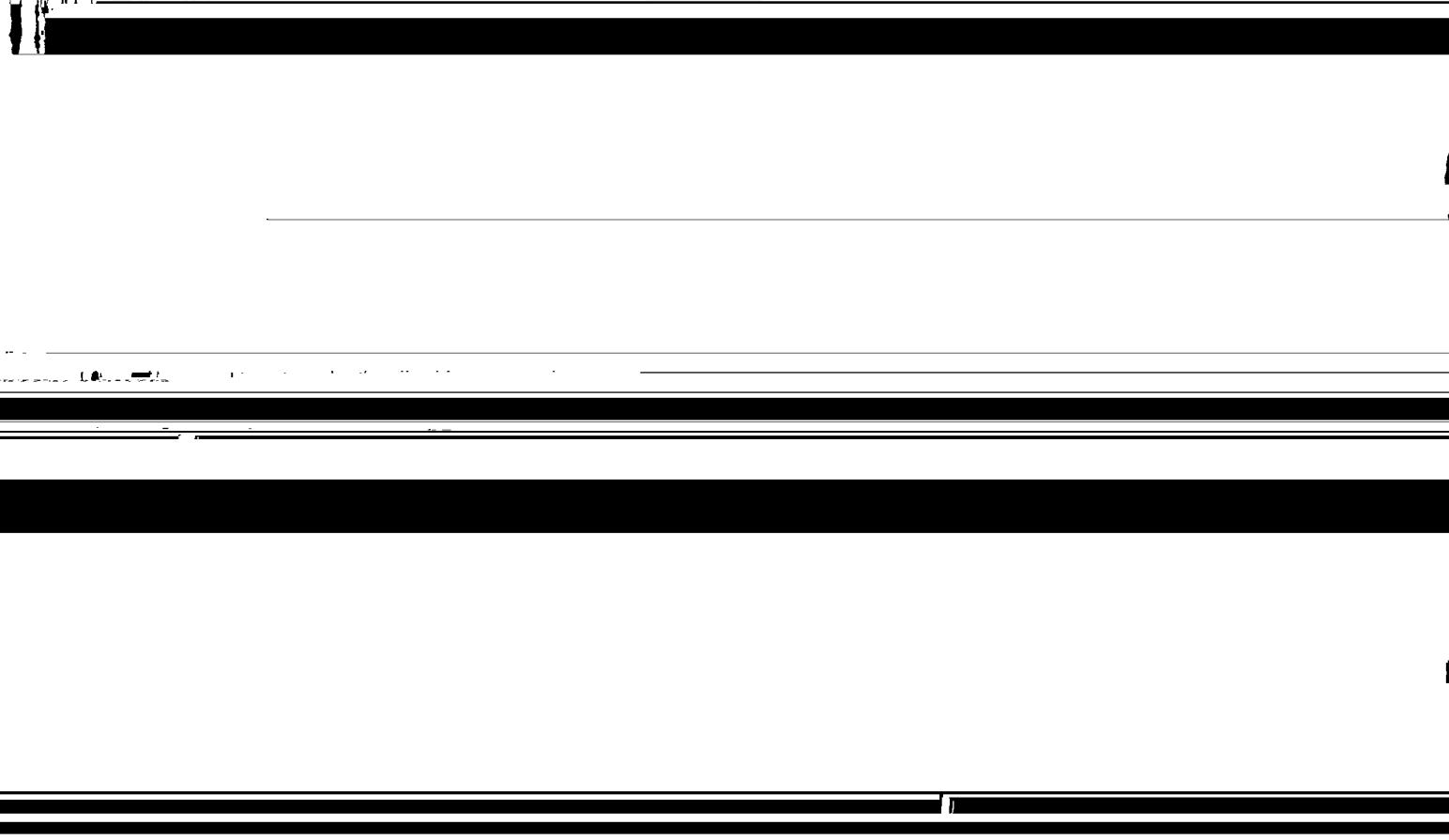
Part IV Capital Gains and Losses for Tax on Investment Income

(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.)
1a UBS #1406 - See attached			P	10/16/17	05/30/18
b UBS #1406 - See attached			P	11/17/14	03/01/18
c UBS #1406 - See attached			P	01/06/11	07/15/18
d UBS #1407 - See attached			P	02/05/18	05/17/18
e UBS #1407 - See attached			P	05/23/11	10/29/18
f UBS #1407 - See attached			P	10/06/06	10/29/18
g UBS #1408 - See attached			P	12/22/17	05/16/18
h UBS #1408 - See attached			P	10/28/15	04/12/18
i UBS #1409 - See attached			P	05/03/18	05/16/18
j UBS #1409 - See attached			P	05/25/11	06/15/18
k UBS #1409 - See attached			P	10/06/06	05/16/18
l UBS #1410 - See attached			P	02/15/17	02/05/18
m UBS #1410 - See attached			P	09/19/13	06/06/18
n UBS #1410 - See attached			P	06/03/09	04/26/18
o UBS #1411 - See attached			P	02/15/18	05/16/18
(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 18,553.				19,301.	-748.
b 118,903.				119,171.	-268.

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Continuation for 990-PF, Part IV  
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Part IV Capital Gains and Losses for Tax on Investment Income



**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.)
<b>1a UBS #1551 - See attached</b>	P	02/06/13	01/15/18
<b>b FHLMC PL G087373, 3%, Due 11/01/46</b>	P	01/01/18	12/31/18
<b>c FNMA PL MA0583, 4%, Due 12/1/40</b>	P	01/01/18	12/31/18
<b>d UBS #2038 - See attached</b>	P	09/05/17	07/23/18
<b>e UBS #2038 - See attached</b>	P	07/08/14	01/19/18
<b>f UBS #2038 - See attached</b>	P	08/13/13	01/19/18
<b>g FHLMC PL G07961, 3.5% Due 03/01/45</b>	P	01/01/18	12/31/18
<b>h FHLMC PL G08775, 4% Due 08/01/47</b>	P	01/01/18	12/31/18
<b>i FHLMC PL G08799, 3% Due 02/01/48</b>	P	01/01/18	12/31/18
<b>j FHLMC PL G08542, 4% Due 08/01/43</b>	P	01/01/18	12/31/18
<b>FHLMC PL G08622, 2% Due 01/01/45</b>	P	01/01/18	12/31/18

**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.)
a FNMA PL AI7784, 4.5%, Due 07/01/41	P	01/01/18	12/31/18
b FNMA PL AL3519, 4.5%, Due 11/01/41	P	01/01/18	12/31/18
c FNMA PL AL5213, 4.5%, Due 04/01/44	P	01/01/18	12/31/18
d FNMA PL AL7231, 3.5%, Due 08/01/45	P	01/01/18	12/31/18
e FNMA PL AL7206, 4%, Due 08/01/45	P	01/01/18	12/31/18
f FNMA PL AS1792, 4.5%, Due 02/01/44	P	01/01/18	12/31/18
g FNMA PL AS1626, 4.5%, Due 02/01/44	P	01/01/18	12/31/18
h FNMA PL AS4168, 4%, Due 12/01/44	P	01/01/18	12/31/18
i FNMA PL AS4169, 4%, Due 12/01/44	P	01/01/18	12/31/18
j FNMA PL AS6675, 4%, Due 02/01/46	P	01/01/18	12/31/18
k FNMA PL AS9518, 3.5%, Due 03/01/32	P	01/01/18	12/31/18
FNMA PL AS6268 3.5% Due 01/01/20	P	01/01/18	12/31/18

**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.)
1a	<b>FNMA PL AW3616, 4%, Due 06/01/44</b>	P	01/01/18	12/31/18
b	<b>FNMA PL AW7104, 4.5%, Due 07/01/44</b>	P	01/01/18	12/31/18
c	<b>FNMA PL AX7732, 3.5%, Due 03/01/45</b>	P	01/01/18	12/31/18
d	<b>FNMA PL AZ2881, 3.5%, Due 08/01/30</b>	P	01/01/18	12/31/18
e	<b>FNMA PL AZ6973, 4%, Due 11/01/45</b>	P	01/01/18	12/31/18
f	<b>FNMA PL BA2889, 4%, Due 11/01/45</b>	P	01/01/18	12/31/18
g	<b>FNMA PL BD2440, 3.5%, Due 01/01/47</b>	P	01/01/18	12/31/18
h	<b>FNMA PL BE3631, 4.5%, Due 05/01/47</b>	P	01/01/18	12/31/18
i	<b>FNMA PL BJ4916, 3.5%, Due 03/01/48</b>	P	01/01/18	12/31/18
j	<b>FNMA PL BM1066, 4%, Due 02/01/47</b>	P	01/01/18	12/31/18
k	<b>FNMA PL 962589, 5.5%, Due 04/01/38</b>	P	01/01/18	12/31/18
l	<b>FNMA PL MA2671, 3.5%, Due 07/01/46</b>	P	01/01/18	12/31/18
m	<b>FNMA PL MA2539, 4%, Due 01/25/46</b>	P	01/01/18	12/31/18
n	<b>FNMA PL MA3494, 3.5%, Due 10/01/46</b>	P	01/01/18	12/31/18
o	<b>FNMA PL MA2771, 3%, Due 09/01/46</b>	P	01/18/18	12/31/18

(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 720.		720.	0.
b 11.		11.	0.
c 1,402.		1,402.	0.
d 1,175.		1,175.	0.
e 1,128.		1,128.	0.
f 1,378.		1,378.	0.
g 529.		529.	0.
h 914.		914.	0.
	389.	389.	0.
	1,787.	1,787.	0.
k 773.		773.	0.
l 980.		980.	0.
m 693.		693.	0.
n 85.		85.	0.
o 5,544.		5,544.	0.

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) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			0.
b			0.
c			0.
d			0.
e			0.
f			0.
g			0.
h			0.
i			0.
j			0.
k			0.
l			0.
m			0.
n			0.
o			0.

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 }

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

**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.)
1a	<b>FNMA PL MA2920, 3%, Due 03/01/47</b>	P	01/01/18	12/31/18
b	<b>FNMA PL MA3026, 3.5%, Due 06/01/47</b>	P	01/01/18	12/31/18
c	<b>FNMA PL MA3027, 4%, Due 06/01/47</b>	P	01/01/18	12/31/18
d	<b>FNMA PL MA3087. 3.5%. Due 08/01/47</b>	P	01/01/18	12/31/18

John C. and Eunice B. Morrison  
Charitable Foundation

04-3310863

**Part XV | Supplementary Information**

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

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
Bethke Radiological Center 133 Old Rd. to Nine Acre Corner <u>Concord, MA 01742</u>	PUBLIC	501(c)(3)	Support and Programs	10,000.
Big Brother Big Sister 155 Merrimack Street <u>Lowell, MA 01852</u>	PUBLIC	501(c)(3)	Youth programs	5,000.
Boston Health Care for Homeless 780 Albany Street <u>Boston, MA 02112</u>	PUBLIC	501(c)(3)	Supplies and programs	5,000.
Boston Rescue Mission P.O. Box 120069 <u>Boston, MA 02112</u>	PUBLIC	501(c)(3)	Assistance	2,500.
Boys and Girls' Club of Dorchester 135 Dorchester Avenue <u>Dorchester, MA 02125</u>	PUBLIC	501(c)(3)	Programs	5,000.
Camp Fatima-Exceptional Children's Week P. O. Box 206 <u>Gilmanton I.W., NH 03837</u>	PUBLIC	501(c)(3)	Camp programs	10,000.
Camp Harbor View Fdn., Inc. 200 Clarendon Street, 60th Fl <u>Boston, MA 02116</u>	PUBLIC	501(c)(3)	Summer programs	5,000.
Cape Cod Challenger Fund 418 Bumps River Road <u>Osterville, MA 02655</u>	PUBLIC	501(c)(3)	Youth programs	2,500.
Cell Phones for Soldiers 243 Winter Street <u>Norwell, MA 02061</u>	PUBLIC	501(c)(3)	Support for the troops	1,500.
Cape Cod Military Support Fdn., Inc. P.O. Box 641 <u>Falmouth, MA 02541</u>	PUBLIC	501(c)(3)	Support	2,500.
<b>Total from continuation sheets</b>				<b>446,500.</b>

**Part XV | Supplementary Information**

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[REDACTED]

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John C. and Eunice B. Morrison  
Charitable Foundation

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**Part XV | Supplementary Information**

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

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
Father Bill's Place 422 Washington Street <u>Quincy, MA 02169</u>	PUBLIC	501(c)(3)	Supplies	5,000.
First Congregational Meeting House P.O. Box 300186 <u>Jamaica Plain, MA 02130</u>	PUBLIC	501(c)(3)	Programs	5,000.
Friends of the Unborn, Inc. P. O. Box 692246 <u>Quincy, MA 02169</u>	PUBLIC	501(c)(3)	Programs	2,500.
Friendship Home P.O. Box 675 <u>Norwell, MA 02061</u>	PUBLIC	501(c)(3)	Support	2,500.
Germantown Neighborhood Center Food Pantry 66 Palmer Street <u>Quincy, MA 02169</u>	PUBLIC	501(c)(3)	Food pantry and Programs	5,000.
Greater Boston Catholic Charities - Sunset Point Camp 185 Columbia Road <u>Dorchester, MA 02121</u>	PUBLIC	501(c)(3)	Summer Camp program	5,000.
Greater Boston Food Bank 99 Atkinson Street <u>Boston, MA 02118</u>	PUBLIC	501(c)(3)	Support	10,000.
Greater Lowell YMCA 35 YMCA Drive <u>Lowell, MA 01852</u>	PUBLIC	501(c)(3)	Equipment and support	5,000.
Hingham Food Pantry 685 Main Street <u>Hingham, MA 02043</u>	PUBLIC	501(c)(3)	Programs	5,000.
Home for Little Wanderers 271 Huntington Avenue <u>Boston, MA 02115</u>	PUBLIC	501(c)(3)	Programs and Support	5,000.
<b>Total from continuation sheets</b>				

John C. and Eunice B. Morrison  
Charitable Foundation

04-3310863

**Part XV Supplementary Information**

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

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
HonorVets, Inc. 235 W. 56th Street, Apt. 17A New York, NY 10019	PUBLIC	501(c)(3)	Programs and support	5,000.
Interfaith Social Services 105 Adams Street Quincy, MA 02169	PUBLIC	501(c)(3)	Programs	7,500.
Travis Roy Foundation 101 Huntington Ave., Ste. 520 Boston, MA 02199	PUBLIC	501(c)(3)	Support	2,500.
Joslin Summer Camp P.O. Box 356 No. Oxford, MA 01537	PUBLIC	501(c)(3)	Summer Camp program	5,000.
Lazarus House Ministries O. Box 408 Lawrence, MA 01842	PUBLIC	501(c)(3)	Support	10,000.
Little Sisters of the Poor 186 Highland Avenue Somerville, MA 02143	PUBLIC	501(c)(3)	Support	10,000.
Littleton Council on the Elderly 37 Shattuck Street Littleton, MA 01460	PUBLIC	501(c)(3)	Supplies	5,000.
Littleton/Ayer Loaves and Fishes 234 Barnum Road Devens, MA 01434	PUBLIC	501(c)(3)	Aid to Needy	7,500.
Lowell Open Pantry 200 Central Street Lowell, MA 01852	PUBLIC	501(c)(3)	Support	5,000.
Lower Cape Outreach Program 30 Brewster Cross Roads Orleans, MA 02653	PUBLIC	501(c)(3)	Programs	10,000.
<b>Total from continuation sheets</b>				

John C. and Eunice B. Morrison  
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**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
Marge Crispin Food Pantry Center 74 Pond Street <u>Braintree, MA 02184</u>	PUBLIC	501(c)(3)	Food bank	5,000.
Marine Toys for Tots Foundation P. O. Box 1947 <u>Quantico, VA 22134</u>	PUBLIC	501(c)(3)	Programs	10,000.
See A New Sun Foundation P.O. Box 1344 <u>Littleton, MA 01460</u>	PUBLIC	501(c)(3)	Programs	10,000.
MEDA 288 Walnut Street, Ste. 103 <u>Newton, MA 02460</u>	PUBLIC	501(c)(3)	Programs	7,500.
Metrowest YMCA 80 Old Connecticut Path <u>Camarillo, MA 01701</u>	PUBLIC	501(c)(3)	Summer camps	5,000.
Plugged In. 40 Freeman Place <u>Needham, MA 02452</u>	PUBLIC	501(c)(3)	Programs	2,500.
Robert Radke Memorial Fund and Scholarship, c/o Cape Cod Fdn. 261 Whites Path, Ste. 2 <u>S. Yarmouth, MA 02664</u>	PUBLIC	501(c)(3)	Scholarships	5,000.
My Brother's Keeper P.O. Box 338 <u>Easton, MA 02356</u>	PUBLIC	501(c)(3)	Programs	20,000.
N.E. Shelter for Homeless Veterans 17 Court Street <u>Boston, MA 02108</u>	PUBLIC	501(c)(3)	Support and programs	5,000.
Newman Catholic Center - UMAA Amherst 472 No. Pleasant Street <u>Amherst, MA 01002</u>	PUBLIC	501(c)(3)	Programs and support	2,500.
<b>Total from continuation sheets</b>				

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**Part XV | Supplementary Information**

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

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
Open Door Pantry 301 Great Road <u>Littletton, MA 01460</u>	PUBLIC	501(c)(3)	Supplies and Support	5,000.
Pan Mass Challenge 77 Fourth Avenue <u>Needham, MA 02494</u>	PUBLIC	501(c)(3)	Sponsorship	10,000.
Pastor's Benevolent Fund 1 Satucket Road <u>Brewster, MA 02631</u>	PUBLIC	501(c)(3)	Programs	5,000.
Pine Street Inn 444 Harrison Avenue <u>Boston, MA 02118</u>	PUBLIC	501(c)(3)	Support	7,500.
Project Bread 45 Border Street <u>East Boston, MA 02128</u>	PUBLIC	501(c)(3)	Support	10,000.
Respond, Inc. P.O. Box 555 <u>Somerville, MA 02143</u>	PUBLIC	501(c)(3)	Supplies	5,000.
Reuben Hoar Library 41 Shattuck Street <u>Littletton, MA 01460</u>	PUBLIC	501(c)(3)	Capital Fund	5,000.
Rosie's Place 869 Harrison Avenue <u>Boston, MA 02118</u>	PUBLIC	501(c)(3)	Support	5,000.
Salvation Army 147 Berkley Street <u>Boston, MA 02116</u>	PUBLIC	501(c)(3)	Support	10,000.
Stone Family Adoption Assistance Fund 57 Bedford St., Ste. 225 <u>Lexington, MA 02420</u>	PUBLIC	501(c)(3)	Support	2,500.
<b>Total from continuation sheets</b>				

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**Part XV | Supplementary Information**

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

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
South Shore Mental Health 500 Victory Road <u>Quincy, MA 02171</u>	PUBLIC	501(c)(3)	Support	<u>10,000.</u>
South Shore YMCA 79 Coddington Street <u>Quincy, MA 02169</u>	PUBLIC	501(c)(3)	Support for summer camps	<u>5,000.</u>
St. Anne's Mission Trip 75 King Street <u>Littleton, MA 01460</u>	PUBLIC	501(c)(3)	Support	<u>2,500.</u>
St. Anne's SVDP 75 King Street <u>Littleton, MA 01460</u>	PUBLIC	501(c)(3)	Support, supplies	<u>2,500.</u>
St. Catherine's Food Pantry 107 North Main Street <u>Westford, MA 01886</u>	PUBLIC	501(c)(3)	Supplies and support	<u>5,000.</u>
St. Catherine's Youth Ministry 107 North Main Street <u>Westford, MA 01886</u>	PUBLIC	501(c)(3)	Programs	<u>2,500.</u>
St. Anne's Food Pantry 75 King Street <u>Littleton, MA 01460</u>	PUBLIC	501(c)(3)	Scholarships	<u>2,500.</u>
St. Gregory's of Sinai Monastery 8252 Harrington Flat Road <u>Kelseyville, CA 95451</u>	PUBLIC	501(c)(3)	Support	<u>2,500.</u>
St. John the Baptist Food Pantry 44 School Street <u>Quincy, MA 02169</u>	PUBLIC	501(c)(3)	Support, Supplies	<u>5,000.</u>
Supportive Living 17 Warren Street <u>Woburn, MA 01801</u>	PUBLIC	501(c)(3)	Support for programs	<u>5,000.</u>
<b>Total from continuation sheets</b>				

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**Part XV** **Supplementary Information**

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

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
Susan G. Komen Breast Cancer Fund P.O. Box 224523 Dallas, TX 75222-4523	PUBLIC	501(c)(3)	Support	5,000.

| (b) Title and average | (d) Contributions to | (e) Expenses |

**Part XV | Supplementary Information**

**3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution**

**Name of Recipient - Camp Fatima-Exceptional Children's Week**

**Camp programs**

**Programs**



## 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
UBS - PF 1404 - INT	390.	390.	
Total to Part I, line 3	390.	390.	

## 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
UBS - PW A1406 - INT. PD.	-3,047.	0.	-3,047.	-3,047.	
UBS - PW A1406 - INTEREST	44,518.	0.	44,518.	44,518.	
UBS - PW A1406 - OID	7.	0.	7.	7.	
UBS - PW A1407 - DIVIDENDS	18,040.	0.	18,040.	18,040.	
UBS - PW A1407 - INTEREST	59.	0.	59.	59.	
UBS - PW A1408 - DIVIDENDS	4,734.	0.	4,734.	4,734.	
UBS - PW A1408 - INTEREST	86.	0.	86.	86.	
UBS - PW A1409 - DIVIDENDS	20,643.	0.	20,643.	20,643.	
UBS - PW A1409 - INTEREST	83.	0.	83.	83.	
UBS - PW A1410 - DIVIDENDS	21,234.	0.	21,234.	21,234.	
UBS - PW A1410 - INTEREST	174.	0.	174.	174.	
UBS - PW A1411 - DIVIDENDS	21,537.	0.	21,537.	21,537.	
UBS - PW A1411 - INTEREST	121.	0.	121.	121.	
UBS - PW A1412 - DIVIDENDS	5,779.	29.	5,750.	5,750.	
UBS - PW A1412 - INTEREST	28.	0.	28.	28.	
UBS - PW A1414 - DIVIDENDS	2,330.	25.	2,305.	2,305.	
UBS - PW A1414 - INTEREST	47.	0.	47.	47.	

UBS - PW A1415 -				
DIVIDENDS	18,683.	3,277.	15,406.	15,406.
UBS - PW A1415 -				
INTEREST	29.	0.	29.	29.
UBS - PW A1416 -				
DIVIDENDS	6,073.	0.	6,073.	6,073.
UBS - PW A1416 -				
INTEREST	41.	0.	41.	41.
UBS - PW A1551 -				
DIVIDENDS	34,239.	51.	34,188.	34,188.
UBS - PW A1551 -				
GVT. INT	13,631.	0.	13,631.	13,631.
UBS - PW A1551 -				
GVT. INT. PD.	-2,412.	0.	-2,412.	-2,412.
UBS - PW A1551 -				
GVT. OID	1,517.	0.	1,517.	1,517.
UBS - PW A1551 -				
OTHER INT.	21,710.	0.	21,710.	21,710.
UBS - PW A1551 -				
OTHER INT. PD.	-203.	0.	-203.	-203.
UBS - PW A2038 -				
DIVIDENDS	40,462.	0.	40,462.	40,462.
UBS - PW A2038 -				
GOVT. INT.	10,574.	0.	10,574.	10,574.
UBS - PW A2038 -				
GOVT. INT.PD.	-1,636.	0.	-1,636.	-1,636.
UBS - PW A2038 -				

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

►

0

**Part IX-A | Summary of Direct Charitable Activities**

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

Expenses

1 N/A

2

3

**Part IX-B | Summary of Program-Related Investments**

Form 990-PF

Taxes

Statement 4

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Foreign Taxes Paid	6,140.	6,140.		0.
To Form 990-PF, Pg 1, ln 18	6,140.	6,140.		0.

Form 990-PF

Other Expenses

Statement 5

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
UBS - Investment advisory fees	82,612.	82,612.		0.
Insurance premium	1,763.	1,763.		0.
UBS - Other Investment Expenses	5,611.	5,611.		0.
Bond Premiums	9,265.	9,265.		0.
Filing fee	125.	0.		125.
Bank Charges	36.	36.		0.
To Form 990-PF, Pg 1, ln 23	99,412.	99,287.		125.

Form 990-PF

U.S. and State/City Government Obligations

Statement 6

Description	U.S. Gov't	Other Gov't	Book Value	Fair Market Value
U.S. T-Notes and Bonds	X		1,120,172.	1,135,945.
Total U.S. Government Obligations			1,120,172.	1,135,945.
Total State and Municipal Government Obligations				
Total to Form 990-PF, Part II, line 10a			1,120,172.	1,135,945.

Form 990-PF

Corporate Stock

Statement 7

Description	Book Value	Fair Market Value
Stocks	4,531,180.	5,103,057.
Total to Form 990-PF, Part II, line 10b	4,531,180.	5,103,057.

Form 990-PF

Corporate Bonds

Statement 8

Description	Book Value	Fair Market Value
FHLMC & FNMA Corporate Bonds	673,792. 1,221,184.	656,942. 1,170,016.
Total to Form 990-PF, Part II, line 10c	1,894,976.	1,826,958.

Form 990-PF

Other Investments

Statement 9

Description	Valuation Method	Book Value	Fair Market Value
Mutual Funds	COST	2,129,885.	2,033,872.
Total to Form 990-PF, Part II, line 13		2,129,885.	2,033,872.