

Extended to November 15, 2019

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

2018

Open to Public Inspection

Form **990-PF**Department of the Treasury
Internal Revenue Service

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

For calendar year 2018 or tax year beginning

, and ending

Name of foundation Alchemy Foundation		A Employer identification number 04-3541830
Number and street (or P O box number if mail is not delivered to street address) 104 Lakeview Avenue	Room/suite	B Telephone number 617-731-6727
City or town, state or province, country, and ZIP or foreign postal code Cambridge, MA 02138		C If exemption application is pending, check here <input type="checkbox"/> 6
G Check all that apply. <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation 04		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 1,329,853.	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				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		220.	220.		Statement 1
4 Dividends and interest from securities		63,973.	63,973.		Statement 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		80,897.			
b Gross sales price for all assets on line 6a 1,411,703.					
7 Capital gain net income (from Part IV, line 2)			80,897.		
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		145,090.	145,090.		
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		4,998.	2,486.		2,512.
c Other professional fees Stmt 4		10,477.	10,477.		0.
17 Interest					
18 Taxes Stmt 5		4,063.	1,063.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses Stmt 6		244.	20.		224.
24 Total operating and administrative expenses. Add lines 13 through 23		19,782.	14,046.		2,736.
25 Contributions, gifts, grants paid		896,730.			896,730.
26 Total expenses and disbursements. Add lines 24 and 25		916,512.	14,046.		899,466.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-771,422.			
b Net investment income (if negative, enter -0-)			131,044.		
c Adjusted net income (if negative, enter -0-)				N/A	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value	
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	15,853.	59,346.	59,346.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
	Liabilities	11 Investments - land, buildings, and equipment, basis ▶		
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other Stmt 7		2,491,635.	1,270,507.	1,270,507.
14 Land, buildings, and equipment, basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		2,507,488.	1,329,853.	1,329,853.
17 Accounts payable and accrued expenses				
18 Grants payable				
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
Foundations that follow SFAS 117, check here and complete lines 24 through 26, and lines 30 and 31.	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	7,289,899.	7,289,899.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	-4,782,411.	-5,960,046.	
	30 Total net assets or fund balances	2,507,488.	1,329,853.	
31 Total liabilities and net assets/fund balances	2,507,488.	1,329,853.		

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	2,507,488.
2 Enter amount from Part I, line 27a	2	-771,422.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1,736,066.
5 Decreases not included in line 2 (itemize) ▶ Unrealized Losses	5	406,213.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,329,853.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a Publicly Traded Securities				
b Capital Gains Dividends				
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 1,406,072.		1,330,806.	75,266.	
b 5,631.			5,631.	
c				
d				
e				
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))	
a			75,266.	
b			5,631.	
c				
d				
e				
2 Capital gain net income or (net capital loss)		<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; padding-left: 5px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div> <div style="margin-left: 10px;"> 2 <div style="border-left: 1px solid black; padding-left: 10px;">80,897.</div> </div> </div>		
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		<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; padding-left: 5px;"> 3 <div style="margin-left: 10px;">N/A</div> </div> </div>		

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

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

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

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

☐ Yes ☒ No

If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2017	856,495.	2,388,531.	.358587
2016	950,726.	3,226,041.	.294704
2015	814,522.	1,674,354.	.486469
2014	546,373.	2,886,948.	.189256
2013	728,477.	3,321,736.	.219306

2 Total of line 1, column (d)	2	1.548322
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	.309664
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	1,668,841.
5 Multiply line 4 by line 3	5	516,780.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,310.
7 Add lines 5 and 6	7	518,090.
8 Enter qualifying distributions from Part XII, line 4 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	8	899,466.

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 checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1 1,310.
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 1,310.
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 1,310.
6 Credits/Payments:		
a 2018 estimated tax payments and 2017 overpayment credited to 2018	6a 641.	
b Exempt foreign organizations - tax withheld at source	6b 0.	
c Tax paid with application for extension of time to file (Form 8868)	6c 4,750.	
d Backup withholding erroneously withheld	6d 0.	
7 Total credits and payments. Add lines 6a through 6d		7 5,391.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached		8 0.
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		10 4,081.
11 Enter the amount of line 10 to be. Credited to 2019 estimated tax <input checked="" type="checkbox"/> 4,081. Refunded <input type="checkbox"/>		11 0.

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 checked="" type="checkbox"/> \$ 0. (2) On foundation managers <input checked="" 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 checked="" 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	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. <input checked="" type="checkbox"/> MA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

Part VII-A. Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		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		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	X	

Website address **N/A**

14 The books are in care of **Jean & Kyra Montagu** Telephone no. **617-731-6727**
 Located at **104 Lakeview Avenue, Cambridge, MA** ZIP+4 **02138**

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here ☐
 and enter the amount of tax-exempt interest received or accrued during the year **15** **N/A**

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? **Yes** **No**
 See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country **16** **X**

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

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

	Yes	No
1a During the year, did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions. Organizations relying on a current notice regarding disaster assistance, check here	N/A	
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018?		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
If "Yes," list the years N/A		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 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.)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?		X

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

5a During the year, did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

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

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

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

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
Jean Montagu	Trustee			
104 Lakeview Avenue				
Cambridge, MA 02138	1.00	0.	0.	0.
Kyra Montagu	Trustee			
104 Lakeview Avenue				
Cambridge, MA 02138	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

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

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

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

0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 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.

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

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	1,623,175.
b	Average of monthly cash balances	1b	71,080.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,694,255.
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	1,694,255.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	25,414.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,668,841.
6	Minimum investment return. Enter 5% of line 5	6	83,442.

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	83,442.
2a	Tax on investment income for 2018 from Part VI, line 5	2a	1,310.
b	Income tax for 2018. (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	1,310.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	82,132.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	82,132.
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	82,132.

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	899,466.
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	899,466.
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	1,310.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	898,156.

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				82,132.
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2018:				
a From 2013	566,331.			
b From 2014	404,120.			
c From 2015	731,910.			
d From 2016	790,190.			
e From 2017	737,374.			
f Total of lines 3a through e	3,229,925.			
4 Qualifying distributions for 2018 from Part XII, line 4: ► \$	899,466.			
a Applied to 2017, but not more than line 2a			0.	
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				82,132.
e Remaining amount distributed out of corpus	817,334.			
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:	4,047,259.			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
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.
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	566,331.			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	3,480,928.			
10 Analysis of line 9.				
a Excess from 2014	404,120.			
b Excess from 2015	731,910.			
c Excess from 2016	790,190.			
d Excess from 2017	737,374.			
e Excess from 2018	817,334.			

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 Paid during the year				
Accion International 10 Fawcett Street, Suite 204 Cambridge, MA 02138-1185	N/A	PC	General Support	200.
ACLU Foundation of Massachusetts, Inc. 212 Congress Street Boston, MA 02110-2410	N/A	PC	General Support	2,500.
Agassiz Baldwin Community, A Cambridge Corporation (aka Maud Morgan Arts) 20 Sacramento Street Cambridge, MA 02138	N/A	PC	Spirit Award	2,500.
Aids Action Committee of Masschuestts, Inc. 75 Amory Street Boston, MA 02119-1051	N/A	PC	General Support	500.
American Cancer Society, Inc. 250 Williams Street NW Atlanta, GA 30303	N/A	PC	General Support	100.
Total			See continuation sheet(s)	896,730.
b Approved for future payment				
None				
Total				0.

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
American Friends Service Committee 1501 Cherry Street Philadelphia, PA 19102	N/A	PC	General Support	500.
American Macular Degeneration Foundation, Inc. P.O. Box 515 Northampton, MA 01061	N/A	PC	General Support	100.
American National Red Cross 431 18th Street NW Washington, DC 20006	N/A	PC	General Support	1,200.
American Repertory Theatre 64 Brattle Street Cambridge, MA 02138-3443	N/A	PC	General Support	6,900.
American Society for Clinical Investigation, Inc. 2015 Manchester Road Ann Arbor, MI 48104	N/A	PC	Work of Vivian Cheung	10,000.
Amnesty International USA, Inc. 5 Penn Plaza, 16th Floor New York, NY 10001	N/A	PC	General Support	3,000.
Art Connection, Inc. 539 Tremont Street Boston, MA 02116-6306	N/A	PC	General Support	100.
Artists For Humanity, Inc. 100 West 2nd Street Boston, MA 02127-1112	N/A	PC	General Support	250.
Ashoka 1700 North Moore Street, Suite 2000 Arlington, VA 22209	N/A	PC	General Support	250.
Associates of the Boston Public Library, Inc. 700 Boylston Street Boston, MA 02116-2813	N/A	PC	General Support	250.
Total from continuation sheets				890,930.

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
Austen Riggs Center, Inc. 25 Main Street Stockbridge, MA 01262	N/A	PC	General Support	100.
BalletRox, Inc. 45 Danforth Street Jamaica Plain, MA 02130-1847	N/A	PC	General Support	100.
Beacon Academy, Inc. 477 Longwood Avenue Boston, MA 02215-5327	N/A	PC	General Support	5,000.
Boston Architectural College 320 Newbury Street Boston, MA 02115-2703	N/A	PC	General Support	250.
Boston Arts Academy Foundation, Inc. 45 Temple Place, 4th Floor Boston, MA 02111	N/A	PC	General Support	5,000.
Boston Book Festival, Inc. 32R Essex Street Cambridge, MA 02139-2646	N/A	PC	General Support	150.
Boston Children's Museum 308 Congress Street Boston, MA 02210	N/A	PC	General Support	35,000.
Boston Foundation, Inc. 75 Arlington Street Boston, MA 02116-3936	N/A	PC	General Support	500.
Boston Health Care for the Homeless Program, Inc. 780 Albany Street Boston, MA 02118-2755	N/A	PC	General Support	500.
Boston Landmarks Orchestra 545 Concord Avenue, Suite 318 Cambridge, MA 02138-1125	N/A	PC	General Support	3,500.
Total from continuation sheets				

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
Boston Rescue Mission, Inc. P.O. Box 120069 Boston, MA 02112-0069	N/A	PC	General Support	100.
Boston Symphony Orchestra, Inc. 301 Mass Avenue Boston, MA 02115-4557	N/A	PC	General Support	10,000.
Brigham and Women's Hospital, Inc. 75 Francis Street Boston, MA 02115	N/A	PC	General Support	500.
Brookline Community Mental Health Center, Inc. 41 Garrison Road Brookline, MA 02445-4445	N/A	PC	General Support	250.
BSA Foundation 290 Congress Street, Suite 200 Boston, MA 02210-1005	N/A	PC	General Support	200.
Cambridge at Home, Inc. 545 Concord Avenue, Suite 104 Cambridge, MA 02138	N/A	PC	Cambridge Neighbors	250.
Cambridge Center For Adult Education, Inc. 42 Brattle Street Cambridge, MA 02138-3712	N/A	PC	General Support	5,000.
Cambridge Community Foundation 99 Bishop Allen Drive Cambridge, MA 02139-3428	N/A	PC	General Support	1,000.
Cambridge Homes, Inc. 45 Braintree Hill Office Park, Suite 3 Braintree, MA 02184-8723	N/A	EOF	General Support	100.
Cambridge Public Library Foundation, Inc. 449 Broadway Cambridge, MA 02138-4125	N/A	PC	General Support	500.
Total from continuation sheets				

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
CARE 151 Ellis Street, NE Atlanta, GA 30303	N/A	PC	General Support	500.
CaringBridge 2750 Blue Water Road, Suite 275 Eagan, MN 55121	N/A	PC	General Support	50.
Carter Center for Children, Inc. 800 Highland Avenue Needham Heights, MA 02494-1607	N/A	PC	General Support	250.
Center for Reproductive Rights 199 Water Street, 22nd Floor New York, NY 10038	N/A	PC	General Support	2,500.
Central Square Theater, Inc. 450 Mass Avenue, 3rd Floor Cambridge, MA 02139-4106	N/A	PC	General Support	1,000.
Ceres, Inc. 99 Chauncy Street, 6th Floor Boston, MA 02111-1703	N/A	PC	General Support	2,500.
Charles River Conservancy 43 Thorndike Street Cambridge, MA 02141-1764	N/A	PC	General Support	10,000.
Charles River Watershed Association, Inc. 190 Park Road Weston, MA 02493	N/A	PC	General Support	200.
Commonwealth School, Inc. 151 Commonwealth Avenue Boston, MA 02116	N/A	PC	General Support	250.
Community Change, Inc. 2 Oliver Street, #802 Boston, MA 02109-4901	N/A	PC	General Support	150.
Total from continuation sheets				

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
Community Cooks, Inc. 337 Somerville Avenue Somerville, MA 02143-2914	N/A	PC	General Support	400.
Company One, Inc. 539 Tremont Street, Studio 202 Boston, MA 02116	N/A	PC	General Support	100.
Conservation Law Foundation, Inc. 62 Summer Street Boston, MA 02110-1008	N/A	PC	General Support	150.
Conservatory Lab Charter School Foundation, Inc. 2120 Dorchester Avenue Dorchester, MA 02124	N/A	PC	General Support	2,500.
Coolidge Corner Theatre Foundation, Inc. 290 Harvard Street Brookline, MA 02446-2917	N/A	PC	General Support	250.
Cornell University 377 Pine Tree Road Ithaca, NY 14850	N/A	PC	Lab of Ornithology	84.
Dana-Farber Cancer Institute 450 Brookline Avenue Boston, MA 02215-5418	N/A	PC	General Support	100.
DeCordova Sculpture Park and Museum 51 Sandy Pond Road Lincoln, MA 01773	N/A	PC	General Support	3,000.
Doctors Without Borders USA, Inc. 40 Rector Street, 16th Floor New York, NY 10006	N/A	PC	General Support	10,000.
Economic Mobility Pathways, Inc. (EMPATH) 1 Washington Mall, 3rd Floor Boston, MA 2108	N/A	PC	Crittenton Women's Union	500.
Total from continuation sheets				

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
Emerald Necklace Conservancy 125 The Fenway Boston, MA 02115-3700	N/A	PC	General Support	500.
Emmanuel Music, Inc. 15 Newbury Street Boston, MA 02116-3105	N/A	PC	General Support	250.
Facing History and Ourselves, Inc. 16 Hurd Road Brookline, MA 02445-6919	N/A	PC	General Support	500.
Family Center, Inc., (d/b/a Parenting Journey) 366 Somerville Avenue Somerville, MA 02143	N/A	PC	General Support	500.
Family Nurturing Center of Massachusetts, Inc. 200 Bowdoin Street Dorchester, MA 02122-1819	N/A	PC	General Support	2,500.
FINCA International, Inc. 1201 15th Street NW, 8th Floor Washington, DC 20005	N/A	PC	General Support	250.
First Literacy, Inc. 160 Boylston Street Boston, MA 02116-4620	N/A	PC	General Support	250.
Fitchburg Art Museum 185 Elm Street Fitchburg, MA 01420-7503	N/A	PC	General Support	200.
Food Project, Inc. 10 Lewis Street Lincoln, MA 01773-3816	N/A	PC	General Support	250.
Friends of Boston Homeless, Inc. 12 Broadway Beverly, MA 01915-4418	N/A	PC	General Support	500.
Total from continuation sheets				

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
Friends of Cambridge Rindge and Latin School, Inc. P.O. Box 39-1541 Cambridge, MA 02139	N/A	PC	General Support	150.
Friends of Mount Auburn Cemetery 580 Mount Auburn Street Cambridge, MA 02138-5517	N/A	PC	General Support	16,500.
Fuller Craft Museum, Inc. 455 Oak Street Brockton, MA 02301-1340	N/A	PC	General Support	500.
Garden Conservancy, Inc. P.O. Box 219 Cold Spring, NY 10516	N/A	PC	General Support	250.
Girls, Inc. 120 Wall Street, 18th Floor New York, NY 10005	N/A	PC	General Support	250.
Habitat For Humanity International 322 West Lamar Street Americus, GA 31709	N/A	PC	General Support	500.
Harris Center for Conservation Education, Inc. 83 Kings Highway Hancock, NH 03449	N/A	PC	General Support	100.
Haymarket People's Fund, Inc. 42 Seaverns Avenue Jamaica Plain, MA 02130-2884	N/A	PC	General Support	250.
Hearth, Inc. 1640 Washington Street Boston, MA 02118-3380	N/A	PC	General Support	250.
Heifer Project International, Inc. 1 World Avenue Little Rock, AR 72202	N/A	PC	General Support	500.
Total from continuation sheets				

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
Horizons for Homeless Children, Inc. 1705 Columbus Avenue Roxbury, MA 02119-1039	N/A	PC	General Support	500.
Human Rights Watch, Inc. 350 Fifth Avenue, 34th Floor New York, NY 10118	N/A	PC	General Support	1,000.
Huntington Theatre Company, Inc. 264 Huntington Avenue Boston, MA 02115-4606	N/A	PC	General Support	1,000.
Indian Hill Music, Inc. P.O. Box 1484 Littleton, MA 01460-4484	N/A	PC	General Support	250.
Institute Of Contemporary Art 25 Harbor Shore Drive Boston, MA 02210-2172	N/A	PC	General Support	1,000.
International Physicians for the Prevention of Nuclear War 339 Pleasant Street, 3rd Floor Malden, MA 02148	N/A	PC	General Support	1,000.
International Planned Parenthood Federation/Western Hemisphere Region 125 Maiden Lane, 9th Floor New York, NY 10038	N/A	PC	General Support	500.
International Refugee Assistance Project, Inc. 40 Rector Street, 9th Floor New York, NY 10006	N/A	PC	General Support	10,000.
International Rescue Committee, Inc. 122 East 42nd Street New York, NY 10168	N/A	PC	General Support	20,000.
Isabella Stewart Gardner Museum 25 Evans Way Boston, MA 02115-5538	N/A	PC	General Support	5,400.
Total from continuation sheets				

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
Justice Resource Institute, Inc. 160 Gould Street, Suite 300 Needham, MA 2494	N/A	PC	My Life My Choice Program	100.
KickStart-International, Inc. 1385 Mission Street, Suite 300 San Francisco, CA 94103	N/A	PC	General Support	10,000.
League Of Women Voters Education Fund 1730 M Street NW, Suite 1000 Washington, DC 20036	N/A	PC	General Support	100.
Lick Wilmerding High School 755 Ocean Avenue San Francisco, CA 94112	N/A	PC	General Support	500.
Longy School of Music of Bard College 27 Garden Street Cambridge, MA 02138	N/A	PC	General Support	500.
Lorelei Ensemble, Inc. P.O. Box 380530 Cambridge, MA 02238-0530	N/A	PC	General Support	150.
MacDowell Colony, Inc. 100 High Street Peterborough, NH 03458	N/A	PC	General Support	1,500.
Madoo Conservancy, Inc. P.O. Box 362 Sagaponack, NY 11962	N/A	PC	General Support	2,600.
Manship Artist Residence and Studios, Inc. P.O. Box 7071 Gloucester, MA 01930-4671	N/A	PC	General Support	150.
Massachusetts Audubon Society, Inc. 208 South Great Road Lincoln, MA 01773-4816	N/A	PC	General Support	200.
Total from continuation sheets				

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
Massachusetts Eye and Ear Associates, Inc. 243 Charles Street Boston, MA 02114-3002	N/A	PC	General Support	100.
Massachusetts Housing & Shelter Alliance, Inc. 7 Bulfinch Place Boston, MA 02114-2900	N/A	PC	General Support	100.
Massachusetts Immigrant and Refugee Advocacy Coalition, Inc. 105 Chauncy Street, Suite 901 Boston, MA 02111	N/A	PC	General Support	11,200.
Massachusetts Project 351, Inc. 400 Atlantic Avenue Boston, MA 02110-3331	N/A	PC	General Support	351.
MassArt - Massachusetts College Of Art and Design Foundation, Inc. 621 Huntington Avenue Boston, MA 02115	N/A	PC	General Support	3,500.
Max Warburg Courage Curriculum, Inc. 263 Huntington Avenue, Box 366 Boston, MA 02115-4506	N/A	PC	General Support	1,000.
Metrics For Management 1330 Broadway, Suite 1135 Oakland, CA 94612	N/A	PC	General Support	500,000.
Mistral Music, Inc. 40 Bayfield Drive Andover, MA 01845-6016	N/A	PC	General Support	150.
Mits, Inc. 1354 Hancock Street, Suite 302 Quincy, MA 02169-5109	N/A	PC	General Support	350.
Museum Of Fine Arts 465 Huntington Avenue Boston, MA 02115-5523	N/A	PC	General Support	6,000.
Total from continuation sheets				

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
Museum of Modern Art 11 West 53rd Street New York, NY 10019-5401	N/A	PC	General Support	100.
Museum Of Science 1 Science Park Boston, MA 02114-1099	N/A	PC	General Support	1,000.
National Alliance on Mental Illness 3803 North Fairfax Drive, Suite 100 Arlington, VA 22203	N/A	PC	General Support	200.
National Association for the Advancement of Colored People (aka NAACP) 4805 Mount Hope Drive Baltimore, MD 21215	N/A	PC	General Support	100.
National Parks Conservation Association 777 6th Street NW, Suite 700 Washington, DC 20001	N/A	PC	General Support	100.
National Trust For Historic Preservation in the US 2600 Virginia Avenue NW, Suite 1100 Washington, DC 20037	N/A	PC	General Support	200.
Natural Resources Defense Council, Inc. 40 West 20th Street New York, NY 10011	N/A	PC	General Support	2,500.
Nature Conservancy, Inc. 4245 North Fairfax Drive, Suite 100 Arlington, VA 22203	N/A	PC	General Support	500.
New England Conservatory of Music 290 Huntington Avenue Boston, MA 02115-5018	N/A	PC	\$500 General Support; \$150 Serente Fund; \$150 Third Stream Fund	1,150.
On The Rise, Inc. 341 Broadway Cambridge, MA 02139-1803	N/A	PC	General Support	500.
Total from continuation sheets				

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
Opus 118 Music Center c/o Kaufman Music Center, 129 West 67th Street New York, NY 10023	N/A	PC	General Support	125.
Oxfam-America, Inc. 226 Causeway Street Boston, MA 02114-2171	N/A	PC	General Support	2,500.
Partners in Health, A Nonprofit Corporation 800 Boylston Street, Suite 300 Boston, MA 02199-7032	N/A	PC	General Support	6,000.
Pathfinder International 9 Galen Street Watertown, MA 02472-4515	N/A	PC	General Support	250.
Peabody Essex Museum, Inc. East India Square Salem, MA 01970	N/A	PC	General Support	660.
Perkins School For The Blind 175 North Beacon Street Watertown, MA 02472-2751	N/A	PC	General Support	1,500.
Peterborough Players, Inc. P.O. Box 118 Peterborough, NH 3458	N/A	PC	General Support	350.
Physicians For Human Rights, Inc. 256 West 38th Street, 9th Floor New York, NY 10018	N/A	PC	General Support	2,000.
Pine Steet Inn Housing, Inc. 444 Harrison Avenue Boston, MA 02118-2404	N/A	PC	General Support	1,000.
Planned Parenthood Federation Of America, Inc. 123 William Street New York, NY 10038	N/A	PC	General Support	5,000.
Total from continuation sheets				

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
Planned Parenthood League Of Massachusetts, Inc. 1055 Commonwealth Avenue Boston, MA 02215-1001	N/A	PC	General Support	25,000.
Ploughshares Fund 315 Bay Street, Suite 400 San Francisco, CA 94133	N/A	PC	General Support	1,000.
Population Connection 2120 L Street NW, Suite 500 Washington, DC 20037	N/A	PC	General Support	1,000.
President and Fellows of Harvard College 1033 Massachusetts Avenue, Suite 3 Cambridge, MA 02138	N/A	PC	\$5,000 Art Museums; \$250 Radcliffe Institute for Advanced Study; \$250 Harvard College Fund	5,500.
Primary Source, Inc. 101 Walnut Street Watertown, MA 02472-4026	N/A	PC	General Support	500.
Project Bread - The Walk for Hunger, Inc. 145 Border Street East Boston, MA 02128-1903	N/A	PC	General Support	200.
Project Step, Inc. Symphony Hall 301 Massachusetts Avenue Boston, MA 02115-4511	N/A	PC	General Support	500.
Proprietors of the Boston Athenaeum 10 Beacon Street, #12 Boston, MA 02108-3764	N/A	PC	General Support	1,500.
Raw Art Works, Inc. 37 Central Square Lynn, MA 01901-1379	N/A	PC	General Support	500.
Reel Fathers, Ltd. 6 Torneo Court Santa Fe, NM 87508	N/A	PC	General Support	100.
Total from continuation sheets				

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
RefugePoint 689 Massachusetts Avenue, 2nd Floor Cambridge, MA 02139	N/A	PC	General Support	40,000.
Reprieve US P.O. Box 3657 New York, NY 10174	N/A	PC	General Support	1,000.
Riverside Community Care, Inc. 270 Bridge Street, Suite 301 Dedham, MA 02026-1798	N/A	PC	General Support	500.
Rogerson Communities 1 Florence Street Boston, MA 02131-3638	N/A	PC	General Support	1,000.
Rosie's Place 889 Harrison Avenue Boston, MA 02118-4004	N/A	PC	General Support	1,000.
San Francisco Museum of Modern Art 151 Third Street San Francisco, CA 94103	N/A	PC	General Support	300.
Save The Children Federation, Inc. 501 Kings Highway East, Suite 400 Fairfield, CT 06825	N/A	PC	General Support	10,000.
Short Grass Music Festival P.O. Box 121 Cimarron, NM 87714	N/A	PC	General Support	100.
Sierra Club Foundation 2101 Webster Street, Suite 1250 Oakland, CA 94612	N/A	PC	General Support	150.
Simmons University 300 The Fenway Boston, MA 02115-5820	N/A	PC	General Support	500.
Total from continuation sheets				

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
Smithsonian Institution P.O. Box 37012 MRC 035 Washington, DC 20013	N/A	PC	National Museum of African American History and Culture	100.
Society Of Arts and Crafts 100 Pier 4 Boulevard Boston, MA 02210-1887	N/A	PC	General Support	250.
Solutions At Work, Inc. 391 Evereteze Way Cambridge, MA 02141-1603	N/A	PC	General Support	100.
Somerville-Cambridge Elder Services, Inc. 61 Medford Street, Suite 2 Somerville, MA 02143-3422	N/A	PC	General Support	250.
South End Community Health Center, Inc. 1601 Washington Street Boston, MA 02118-1951	N/A	PC	General Support	250.
Southern Poverty Law Center, Inc. 400 Washington Avenue Montgomery, AL 36104	N/A	PC	General Support	100.
St. Boniface Haiti Foundation, Inc. 40 Glen Avenue Newton, MA 02459-2066	N/A	PC	General Support	500.
St. Botolph Club Foundation 199 Commonwealth Avenue Boston, MA 02116-1704	N/A	PC	General Support	350.
The Arnold Arboretum Committee, Inc. 6 Hopkins Road Jamaica Plain, MA 02130-3441	N/A	PC	General Support	500.
The Center for Independent Documentary, Inc. 1300 Soldiers Field Road, Suite 5 Boston, MA 02135	N/A	PC	Community Supported Film	100.
Total from continuation sheets				

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
The Friends of the Bishop Strachan School, Inc. 298 Lonsdale Road Toronto, Ontario, CANADA	N/A	PC	General Support	200.
The Greater Boston Food Bank, Inc. 70 South Bay Avenue Boston, MA 02118-2704	N/A	PC	General Support	1,000.
The Home for Little Wanderers, Inc. 10 Guest Street, Suite 3 Boston, MA 02135-2066	N/A	PC	General Support	200.
The Metropolitan Museum Of Art 1000 Fifth Avenue New York, NY 10028-0198	N/A	PC	General Support	560.
The Neighborhood House Charter School, Inc. 21 Queen Street Dorchester, MA 02122-2509	N/A	PC	General Support	2,000.
The Trustees of Reservations 200 High Street, 4th Floor Boston, MA 02110	N/A	PC	General Support	250.
Trustees of Boston University 881 Commonwealth Avenue, 4th Floor Boston, MA 02215-1390	N/A	PC	WBUR	2,500.
Trustees of King's Chapel 64 Beacon Street Boston, MA 02108-3531	N/A	PC	Music Programs	100.
Trustees of Phillips Academy 180 Main Street Andover, MA 01810-4166	N/A	PC	Addison Gallery Of American Art	100.
Tufts University Ballou Hall Medford, MA 02155	N/A	PC	\$1,500 School of the Museum of Fine Arts; \$500 Refugee Project	2,000.
Total from continuation sheets				

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
UNICEF USA 125 Maiden Lane New York, NY 10038	N/A	PC	General Support	15,000.
Union of Concerned Scientists, Inc. 2 Brattle Square, Suite 6 Cambridge, MA 02138-3756	N/A	PC	General Support	500.
United States Association for UNHCR 1310 L Street NW, Suite 450 Washington, DC 20005	N/A	PC	General Support	15,000.
Waterkeeper Alliance 180 Maiden Lane, Suite 603 New York, NY 10038	N/A	PC	General Support	50.
WGBH Educational Foundation One Guest Street Boston, MA 02135	N/A	PC	General Support	2,500.
Women's Action for New Direction Education Fund, Inc. 810 7th Street, NE Washington, DC 20002	N/A	PC	General Support	500.
World Music, Inc. (aka World Music/CRASHarts) 720 Massachusetts Avenue Cambridge, MA 02139	N/A	PC	General Support	500.
Young Audiences Of Massachusetts, Inc. 89 South Street, Suite 601 Boston, MA 02111-2747	N/A	PC	General Support	200.
Total from continuation sheets				

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
Boston Private Bank	20.	20.	
Fidelity	200.	200.	
Total to Part I, line 3	220.	220.	

Form 990-PF Dividends and Interest from Securities Statement 2

Source	Gross Amount	Capital Gains Dividends	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income
Fidelity	69,604.	5,631.	63,973.	63,973.	
To Part I, line 4	69,604.	5,631.	63,973.	63,973.	

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 Fees	4,773.	2,386.		2,387.
Bookkeeping Fees	225.	100.		125.
To Form 990-PF, Pg 1, ln 16b	4,998.	2,486.		2,512.

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 Management Fees	10,477.	10,477.		0.
To Form 990-PF, Pg 1, ln 16c	10,477.	10,477.		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
Excise Tax	3,000.	0.		0.
Foreign Tax	1,063.	1,063.		0.
To Form 990-PF, Pg 1, ln 18	4,063.	1,063.		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 Charges	20.	20.		0.
State Fees	224.	0.		224.
To Form 990-PF, Pg 1, ln 23	244.	20.		224.

Form 990-PF	Other Investments	Statement	7
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Description	Valuation Method	Book Value	Fair Market Value
Boston Private Wealth - Fidelity - See Statement 10	COST	1,270,507.	1,270,507.
Total to Form 990-PF, Part II, line 13		1,270,507.	1,270,507.

Form 990-PF	Part XV - Line 1a List of Foundation Managers	Statement	8
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Name of Manager

Jean Montagu
Kyra Montagu