

For calendar year 2018, or tax year beginning 01-01-2018, and ending 12-31-2018

Name of foundation HURDLE HILL FOUNDATION C/O WOODSTOCK SERVICES CO LLC		A Employer identification number 04-6012782	
Number and street (or P O box number if mail is not delivered to street address) 101 ARCH ST NO 1000		Room/suite	B Telephone number (see instructions) (617) 227-0600
City or town, state or province, country, and ZIP or foreign postal code BOSTON, MA 02110		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☒ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2 Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 552,313	J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	55,567			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	10,659	10,465		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	59,575			
	b Gross sales price for all assets on line 6a _____ 179,413				
	7 Capital gain net income (from Part IV, line 2)		144,073		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	125,801	154,538		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	5,000	3,333		1,667
	c Other professional fees (attach schedule)	5,591	3,727		1,864
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	1,139	21		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	39	4		35
	24 Total operating and administrative expenses. Add lines 13 through 23	11,769	7,085		3,566
	25 Contributions, gifts, grants paid	52,200			52,200
	26 Total expenses and disbursements. Add lines 24 and 25	63,969	7,085		55,766
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	61,832			
	b Net investment income (if negative, enter -0-)		147,453		
c Adjusted net income (if negative, enter -0-)					

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	1				
	2	Savings and temporary cash investments	36,199	33,067	33,067		
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____					
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____					
	5	Grants receivable					
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)					
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____					
	8	Inventories for sale or use					
	9	Prepaid expenses and deferred charges					
	10a	Investments—U S and state government obligations (attach schedule)					
	b	Investments—corporate stock (attach schedule)	325,208	390,173	519,246		
	c	Investments—corporate bonds (attach schedule)					
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
	12	Investments—mortgage loans					
	13	Investments—other (attach schedule)					
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
15	Other assets (describe ▶ _____)						
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	361,408	423,240	552,313			
Liabilities	17	Accounts payable and accrued expenses					
	18	Grants payable					
	19	Deferred revenue					
	20	Loans from officers, directors, trustees, and other disqualified persons					
	21	Mortgages and other notes payable (attach schedule)					
	22	Other liabilities (describe ▶ _____)					
	23	Total liabilities (add lines 17 through 22)	0	0			
Net Assets or Fund Balances	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	361,408	423,240			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0			
	29	Retained earnings, accumulated income, endowment, or other funds	0	0			
30	Total net assets or fund balances (see instructions)	361,408	423,240				
31	Total liabilities and net assets/fund balances (see instructions) .	361,408	423,240				

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	361,408
2	Enter amount from Part I, line 27a	2	61,832
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	423,240
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	423,240

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 See Additional Data Table				
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(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	
a See Additional Data Table			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	144,073
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	

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	50,536	504,260	0 100218
2016	44,459	466,822	0 095238
2015	57,221	468,166	0 122224
2014	51,999	436,099	0 119237
2013	51,390	379,399	0 135451
2 Total of line 1, column (d)			2 0 572368
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5 0, or by the number of years the foundation has been in existence if less than 5 years			3 0 114474
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5			4 560,418
5 Multiply line 4 by line 3			5 64,153
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 1,475
7 Add lines 5 and 6			7 65,628
8 Enter qualifying distributions from Part XII, line 4			8 55,766

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 ☐ 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 ☐ and enter 1% of Part I, line 27b	1	2,949
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	2,949
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	2,949
6	Credits/Payments		
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	2,999
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	2,999
8	Enter any penalty for underpayment of estimated tax. Check here ☐ 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	50
11	Enter the amount of line 10 to be Credited to 2019 estimated tax ▶ 50 Refunded ▶	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?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for 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	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 ▶ \$ 0 (2) On foundation managers ▶ \$ 0		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ 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	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? If "Yes," attach a conformed copy of the changes	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? If "Yes," attach the statement required by General Instruction T	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? If "Yes," complete Part II, col (c), and Part XV	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? If "No," attach explanation .	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. If "Yes," complete Part XIV	9	No
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	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		No
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 ▶ N/A	13	Yes	
14	The books are in care of ▶ WOODSTOCK SERVICES CO LLC Telephone no ▶ (617) 227-0600			

Located at **▶** 101 ARCH STREET BOSTON MAZIP+4 **▶** 02110

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

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? ☐ Yes ☒ No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ 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)? ☐ Yes ☒ 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). ☐ Yes ☒ 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. 1b		
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? ☐ Yes ☒ No		
	If "Yes," list the years ▶ 20____, 20____, 20____, 20____		
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? ☐ Yes ☒ 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)

		Yes	No
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.		5b
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? If "Yes," attach the statement required by Regulations section 53.4945–5(d)	☐ Yes ☐ No	
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 No
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?		7b
8	Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment 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, 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
HENRY P PHIPPEN C/O AGAWAM TRUST MANAGEMENT CO BOSTON, MA 02110	TRUSTEE 2 00	0	0	0
WILLIAM L PHIPPEN C/O AGAWAM TRUST MANAGEMENT CO BOSTON, MA 02110	TRUSTEE 0 50	0	0	0
PETER D PHIPPEN C/O AGAWAM TRUST MANAGEMENT CO BOSTON, MA 02110	TRUSTEE 0 25	0	0	0
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				0

Part 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".

(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	
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

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	532,991
b	Average of monthly cash balances.	1b	35,961
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	568,952
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	568,952
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	8,534
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	560,418
6	Minimum investment return. Enter 5% of line 5.	6	28,021

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	28,021
2a	Tax on investment income for 2018 from Part VI, line 5.	2a	2,949
b	Income tax for 2018 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	2,949
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	25,072
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	25,072
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	25,072

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	55,766
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	55,766
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	55,766

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				25,072
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2018				
a From 2013. 33,158				
b From 2014. 31,091				
c From 2015.				
d From 2016. 42,010				
e From 2017. 50,536				
f Total of lines 3a through e.	156,795			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ 55,766				
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).	55,766			
d Applied to 2018 distributable amount.				0
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))	25,072			25,072
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	187,489			
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 instructions			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 (see instructions).	8,086			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	179,403			
10 Analysis of line 9				
a Excess from 2014. 31,091				
b Excess from 2015.				
c Excess from 2016. 42,010				
d Excess from 2017. 50,536				
e Excess from 2018. 55,766				

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. ▶					
b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)					
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
	(a) 2018	(b) 2017	(c) 2016	(d) 2015	
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . .					
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)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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)) See Additional Data Table	
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> See Additional Data Table				
Total			▶ 3a	
b <i>Approved for future payment</i>				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated

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

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

[illegible]

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

	Yes	No
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1a(1)	No
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
--------------	--	-----------

1b(5)		No
--------------	--	-----------

1b(6)		No
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1c		No
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value
ue

[illegible]

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

**Sign
Here**

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.

2019-05-13

May the IRS discuss this return with the preparer shown below

(see instr)? ☒ Yes ☐ No

Signature of officer or trustee

Date _____

Title

**Paid
Preparer
Use Only**

Print/Type preparer's name THOMAS J LESPASIO	Preparer's Signature	Date 2019-05-09	Check if self-employed ☐	PTIN P00423878
Firm's name ► WOODSTOCK SERVICES COMPANY LLC				Firm's EIN ► 20-8708209
Firm's address ► 101 ARCH STREET SUITE 1000 BOSTON, MA 02110				Phone no (617) 227-0600

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d			
List and describe the kind(s) of property sold (e g , real estate, (a) 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)
1 100 SHS FORTINET INC	P	2017-10-26	2018-11-08
1 50 SHS AUTOMATIC DATA PROCESSING	P	2012-06-07	2018-11-08
200 SHS BANK NEW YORK MELLON	P	2005-06-07	2018-11-08
236 SHS CISCO SYSTEMS INC	P	2001-06-29	2018-11-08
874 SHS GENERAL ELECTRIC CO	D	1993-11-04	2018-10-03
650 SHS HANESBRAND INC	P	2009-03-12	2018-11-08
25 SHS INTUITIVE SURGICAL	P	2009-04-15	2018-11-08
245 SHS MCDONALDS CORP	D	1980-02-27	2018-11-08
25 SHS MCDONALDS CORP	D	1980-02-27	2018-12-03
65 SHS MCDONALDS CORP	D	1980-02-27	2018-12-11

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
7,810		4,005	3,805
7,407		2,348	5,059
9,800		5,166	4,634
11,361		4,028	7,333
10,855		9,800	1,055
10,900		1,056	9,844
13,524		987	12,537
45,368		239	45,129
4,639		24	4,615
11,930		62	11,868

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
			3,805
			5,059
			4,634
			7,333
			1,055
			9,844
			12,537
			45,129
			4,615
			11,868

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

List and describe the kind(s) of property sold (e g , real estate, (a) 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)
111 SHS MICROSOFT CORP		D	1994-02-23	2018-11-08
1	146 SHS ORACLE CORP	P	2003-02-14	2018-11-08
	25 SHS OREILLY AUTOMOTIVE INC	P	2011-02-15	2018-11-08
	61 SHS STATE STREET CORP	D	2010-06-22	2018-11-08
	75 SHS STRYKER CORP	P	2006-09-08	2018-11-08

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
12,343		282	12,061
7,341		1,835	5,506
8,813		1,429	7,384
4,491		412	4,079
12,831		3,667	9,164

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) 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	
			12,061
			5,506
			7,384
			4,079
			9,164

Form 990PF Part XV Line 1a - 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).

HENRY P PHIPPEN

WILLIAM L PHIPPEN

PETER D PHIPPEN

Form 990PF Part XV Line 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>				
CAPE ANN ANIMAL AID4 PAWS LANE GLOUCESTER, MA 01930	NONE	NONE	HUMANITARIAN	250
ACCORD FOOD PANTRY69 WILLOW ST HAMILTON, MA 01982	NONE	NONE	SOCIAL	500
ALUMNAE FUND OF SMITH COLLEGE ELM ST NORTHAMPTON, MA 01063	NONE	NONE	EDUCATIONAL	500
Total ▶ 3a				52,200

Form 990PF Part XV Line 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>				
AMERICAN RED CROSS 285 COLUMBUS AVE BOSTON, MA 02116	NONE	NONE	SOCIAL	250
ANIMAL RESCUE LEAGUE OF BOSTON 10 CHANDLER ST BOSTON, MA 02116	NONE	NONE	SOCIAL	250
ASSUMPTION GREEK ORTHODOX CHURCH 111 ISLAND POND ROAD MANCHESTER, NH 03109	NONE	NONE	RELIGIOUS	750
Total ▶ 3a				52,200

Form 990PF Part XV Line 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>				
BEVERLY BOOTSTRAPS221 CABOT ST BEVERLY, MA 01915	NONE	NONE	SOCIAL	250
BEVERLY HOSPITAL85 HERRICK STREET BEVERLY FARMS, MA 01915	NONE	NONE	MEDICAL	500
BOSTON SYMPHONY ORCHESTRA 301 MASSACHUSETTS AVE BOSTON, MA 02115	NONE	NONE	EDUCATIONAL	500
Total ▶ 3a				52,200

Form 990PF Part XV Line 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>				
BROOKWOOD SCHOOL ONE BROOKWOOD RD MANCHESTER, MA 01944	NONE	NONE	EDUCATIONAL	100
CENTER FOR PLANT CONSERVATION PO BOX 229 ST LOUIS, MO 63166	NONE	NONE	EDUCATIONAL	250
CHRIST CHURCH OF HAMILTON AND WENHAM 149 ASHBURY ST SOUTH HAMILTON, MA 01982	NONE	NONE	RELIGIOUS	750
Total ► 3a				52,200

Form 990PF Part XV Line 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>				
DIABETES SOCIETY OF GREATER BOSTON 1330 BEACON ST BROOKLINE, MA 02467	NONE	NONE	MEDICAL	-100
DOCTORS WITHOUT BORDERS 333 7TH AVE - 2ND FLOOR NEW YORK, NY 100015004	NONE	NONE	MEDICAL	500
ESSEX COUNTY GREENBELT ASSOCIATION 82 EASTERN AVE ESSEX, MA 01929	NONE	NONE	CONSERVATION	11,250
Total ▶ 3a				52,200

Form 990PF Part XV Line 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>				
ESSEX COUNTY TRAIL 162 MAIN STREET STE 5 WENHAM, MA 01984	NONE	NONE	CONSERVATION	500
ESSEX NATIONAL HERITAGE 12 FEDERAL STREET STE 12 SALEM, MA 01970	NONE	NONE	5CONSERVATION	500
EXPRESS YOURSELF6 ELLIS ST PEABODY, MA 01960	NONE	NONE	SOCIAL	100
Total ▶ 3a				52,200

Form 990PF Part XV Line 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>				
FIRST CHURCH OF CHRIST SCIENTIST 887 CONCORD ST FRAMINGHAM, MA 01701	NONE	NONE	RELIGIOUS	200
FIRST UNIVERSALIST CHURCH OF ESSEX 59 MAIN ST ESSEX, MA 01929	NONE	NONE	RELIGIOUS	250
GLEN URQUHART SCHOOL74 HART ST BEVERLY FARMS, MA 01915	NONE	NONE	EDUCATIONAL	2,000
Total ► 3a				52,200

Form 990PF Part XV Line 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>				
GLOBE SANTA FUNDPO BOX 845059 BOSTON, MA 02284	NONE	NONE	SOCIAL	500
GOVERNOR'S ACADEMY1 ELM STREET BYFIELD, MA 01922	NONE	NONE	EDUCATION	5,500
GREENPEACE702 H ST NW WASHINGTON, DC 20001	NONE	NONE	ENVIRONMENTAL	250
Total ▶ 3a				52,200

Form 990PF Part XV Line 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>				
HARTWICK COLLEGE1 HARTWICK DR ONEONTA, NY 13870	NONE	NONE	EDUCATIONAL	500
IPSWICH RIVER WATERSHED ASSOCIATION INC 240 COUNTY RD IPSWICH, MA 01938	NONE	NONE	CONSERVATION	1,750
MAD RIVER VALLEY COMMUNITY FUND 5223 MAIN ST WAITSFIELD, VT 05673	NONE	NONE	CONSERVATION	1,000
Total ► 3a				52,200

Form 990PF Part XV Line 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				
MAKE-A-WISH FOUNDATION 1 BULFINCH PLACE BOSTON, MA 02114	NONE	NONE	SOCIAL	500
MARY BAKER EDDY LIBRARY 200 MASSACHUSETTS AVE BOSTON, MA 02115	NONE	NONE	EDUCATIONALEducational	100
MASSACHUSETTS AUDUBON SOCIETY 208 SOUTH GREAT RD LINCOLN, MA 01773	NONE	NONE	CONSERVATION	500
Total ► 3a				52,200

Form 990PF Part XV Line 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>				
FAMILY PROMISE NORTH SHORE BOSTON 330 RANTOUL ST BEVERLY, MA 01915	NONE	NONE	SOCIAL	250
NORTH SHORE MEDICAL CENTER 81 HIGHLAND AVE SALEM, MA 01970	NONE	NONE	MEDICAL	500
NORTH SHORE NORDIC ASSOCIATION PO BOX 2101 SOUTH HAMILTON, MA 01980	NONE	NONE	SOCIAL	500
Total ▶ 3a				52,200

Form 990PF Part XV Line 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>				
NOTRE DAME CHILDREN'S CLASS 74 GRAPEVINE RD WENHAM, MA 01984	NONE	NONE	EDUCATIONAL	2,000
PEABODY ESSEX MUSEUM 161 ESSEX ST E INDIA SQUARE SALEM, MA 01970	NONE	NONE	CULTURAL	750
PINGREE SCHOOL537 HIGHLAND AVE SOUTH HAMILTON, MA 01982	NONE	NONE	EDUCATIONAL	750
Total ▶ 3a				52,200

Form 990PF Part XV Line 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				
PLANNED PARENTHOOD LEAGUE OF MASS 1055 COMMONWEALTH AVE BOSTON, MA 02215	NONE	NONE	EDUCATIONAL	250
PRINCIPIA COLLEGE13201 CLAYTON RD ST LOUIS, MO 63131	NONE	NONE	EDUCATIONAL	100
FARMS-PRIDES COMMUNITY ASSOC 14 OAK ST BEVERLY, MA 01915	NONE	NONE	SOCIAL	100
Total ▶ 3a				52,200

Form 990PF Part XV Line 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>				
PROJECT BREAD138 MAIN ST WENHAM, MA 01984	NONE	NONE	SOCIAL	250
ROSIE'S PLACE889 HARRISON AVE BOSTON, MA 02118	NONE	NONE	SOCIAL	250
SEWPPORTIVE FRIENDSPO BOX 5223 BEVERLY FARMS, MA 01915	NONE	NONE	SOCIAL	3,850
Total ▶ 3a				52,200

Form 990PF Part XV Line 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>				
THE FOOD PROJECT112 SOHIER RD BEVERLY, MA 01915	NONE	NONE	SOCIAL	1,000
NORTH SHORE EDUCATION CONSORTIUM 53 PARKER HILL AVENUE ROXBURY CROSSING, MA 02120	NONE	NONE	EDUCATIONAL	250
THE TOWN OF WENHAM - VETERANS WAR MEMORIAL 63 NORTH ST ANDOVER, NH 03216	NONE	NONE	EDUCATIONAL	250
Total ▶ 3a				52,200

Form 990PF Part XV Line 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>				
THE TRUSTEES OF RESERVATIONS 572 ESSEX STREET BEVERLY, MA 01915	NONE	NONE	CONSERVATION	2,250
UNITED WAY OF CENTRAL MASSACHUSETTS 484 MAIN ST WORCESTER, MA 01608	NONE	NONE	SOCIAL	500
VERMONT LAND TRUST8 BAILEY AVE MONTPELIER, VT 05602	NONE	NONE	CONSERVATION	250
Total ▶ 3a				52,200

Form 990PF Part XV Line 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>				
VICTORIA FALLS WILDLIFE TRUST PO BOX 23183 SAN DIEGO, CA 92193	NONE	NONE	ENVIRONMENTAL	250
WELLSPRING HOUSE 890 COMMONWEALTH AVE BOSTON, MA 02215	NONE	NONE	SOCIAL	750
WENHAM HISTORICAL ASSOCIATION AND MUSEUM 132 MAIN ST WENHAM, MA 01984	NONE	NONE	EDUCATIONAL	2,250
Total ▶ 3a				52,200

Form 990PF Part XV Line 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>				
WILDLIFE CONSERVATION NETWORK 209 MISSISSIPPI STREET SAN FRANCISCO, CA 94107	NONE	NONE	CONSERVATION	250
WINDRUSH FARM30 BROOKVIEW RD BOXFORD, MA 01921	NONE	NONE	RELIGIOUS	2,500
WORLD WILDLIFE FUND INC 1250 24TH ST NW WASHINGTON, DC 20037	NONE	NONE	CONSERVATION	250
Total ▶ 3a				52,200

Form 990PF Part XV Line 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>				
MAD RIVER PATH ASSOCIATION 4061 MAIN ST WAITSFIELD, VT 05673	NONE	NONE	CONSERVATION	250
OXFAM - AMERICA226 CAUSWAY ST BOSTON, MA 02114	NONE	NONE	SOCIAL	250
PLANNED PARENTHOOD FEDERATION OF AMERICA 1055 COMMONWEALTH AVE BOSTON, MA 02215	NONE	NONE	HEALTH	500
Total ▶ 3a				52,200

Form 990PF Part XV Line 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>				
SOS CHILDREN'S VILLAGES 84 STATE ST BOSTON, MA 02109	NONE	NONE	HUMANITARIUM	250
Total  3a				52,200

TY 2018 Accounting Fees Schedule**Name:** HURDLE HILL FOUNDATION

C/O WOODSTOCK SERVICES CO LLC

EIN: 04-6012782

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING SERVICES	5,000	3,333		1,667

TY 2018 Distribution from Corpus Election

Name: HURDLE HILL FOUNDATION
C/O WOODSTOCK SERVICES CO LLC

EIN: 04-6012782

Election: HURDLE HILL FOUNDATION 04-6012782 ATTACHMENT TO FORM 990PF 2018IN ACCORDANCE WITH SECTIONS 4942(H)(2) AND REG. 53.4942(A)-3(C)(2) OF THE INTERNAL REVENUE CODE OF 1986, AS AMENDED, HURDLE HILL FOUNDATION HEREBY ELECTS TO TREAT CERTAIN CURRENT YEAR QUALIFYING DISTRIBUTIONS IN EXCESS OF THE PRECEDING TAX YEAR'S UNDISTRIBUTED INCOME AS BEING MADE FROM CORPUS. IN 2018 THE FOUNDATION RECEIVED \$55,567 IN CONTRIBUTIONS OF CASH AND SECURITIES FROM INDIVIDUALS. THE FOUNDATION'S DISTRIBUTABLE AMOUNT FOR 2018 WAS \$25,072. THE FOUNDATION MADE QUALIFYING DISTRIBUTIONS IN 2018 IN THE AMOUNT OF \$55,766. DISTRIBUTIONS OUT OF CORPUS (TO WHICH THIS ELECTION APPLIES) WITH RESPECT TO 2018 CONTRIBUTIONS RECEIVED TO SATISFY THE REQUIREMENTS OF SECTION 170(B)(1)(F) & 4942(G)(3) WERE \$55,766. THE AMOUNT OF QUALIFYING DISTSTS APPLIED TO THE 2018 DISTRIBUTABLE AMOUNT TOTALED \$ 0 EXCESS DIST. CARRYOVER APPLIED TO THE 2017 DISTRIBUTABLE AMOUNT TOTALED \$25,072. EXCESS DISTSTS CARRYOVER TO 2019 IS \$179,403

TY 2018 Investments Corporate Stock Schedule

Name: HURDLE HILL FOUNDATION
C/O WOODSTOCK SERVICES CO LLC
EIN: 04-6012782

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
125 ISHARES MSCI EAFE ETF	8,919	7,347
44 SHS ALLERGAN PLC	13,493	5,881
175 SHS MEDTRONIC PLC	13,145	15,918
75 SHS CHUBB LTD COM NPV	8,331	9,688
248 SHS ABBOTT LABORATORIES	6,631	17,938
10 SHS ALPHABET INC CLC	2,318	10,356
10 SHS ALPHABET INC CLA	2,317	10,450
100 SHS APACHE CORP	6,630	2,625
50 SHS AUTOMATIC DATA PROCESSING	2,348	6,556
200 SHS BP PLC SPONS ADR	10,889	7,584
75 SHS BERKSHIRE HATHAWAY INC CLB	12,767	15,314
225 SHS CVS HEALTH CORP	6,602	14,742
250 SHS CISCO SYSTEM INC	5,146	10,832
100 SHS ECOLAB INC	4,564	14,735
125 SHS EXXON MOBIL CORP	10,023	8,524
45 SHS ILLINOIS TOOL WORKS	5,088	5,701
50 SHS INTUITIVE SURGICAL INC	1,975	23,946
375 SHS KINDER MORGAN INC	12,316	5,767
125 SHS MCCORMICK & CO INC	4,206	17,405
65 SHS MCDONALDS CORP	11,742	11,542
150 SHS MERCK & CO NEW	5,008	11,462
250 SHS MICROSOFT CORP	11,911	25,393
75 SHS OREILLY AUTOMOTIVE INC	4,289	25,825
275 SHS ORACLE CORP	8,885	12,416
170 SHS PEPSICO	9,894	18,782
341 SHS PFIZER INC	8,338	14,885
100 SHS PROCTER AND GAMBLE CO	6,609	9,192
75 SHS SCHLUMBERGER LTD	6,246	2,706
200 SHS STATE STREET CORP	11,521	12,614
100 SHS UNITED TECHNOLOGIES CORP	11,169	10,648

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
150 SHS VERIZON COMMUNICATIONS	7,659	8,433
250 SHS FORTINET	10,007	17,608
125 SHS JP MORGAN CHASE	12,972	12,202
140 SHS UBIQUTI	8,681	13,917
100 SHS APPLE INC	20,071	15,774
500 SHS BANK OF AMERICA	14,585	12,320
250 SHS FLOWSERVE CORP	13,591	9,505
60 SHS HOME DEPOT INC	11,312	10,309
65 SHS LIGAND PHARMACEUTICALS	11,324	8,820
150 SHS OMNICOM GROUP INC	11,424	10,986
200 SHS QUALCOMM INC	11,776	11,382
40 SHS ROPER TECHNOLOGIES INC	11,845	10,661
80 SHS VISA INC CL A	11,606	10,555

TY 2018 Other Expenses Schedule**Name:** HURDLE HILL FOUNDATION

C/O WOODSTOCK SERVICES CO LLC

EIN: 04-6012782**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BP PLC SPONS ADR FEE	4	4		0
MA FORM PC FILING FEE	35	0		35

TY 2018 Other Professional Fees Schedule

Name: HURDLE HILL FOUNDATION

C/O WOODSTOCK SERVICES CO LLC

EIN: 04-6012782

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TRUSTEES FEES	5,591	3,727		1,864

TY 2018 Taxes Schedule

Name: HURDLE HILL FOUNDATION
C/O WOODSTOCK SERVICES CO LLC

EIN: 04-6012782

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES WITHHELD	21	21		0
FEDERAL PVT FOUNDATION EXCISE TAXES	1,118	0		0

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF ▶ Go to <u>www.irs.gov/Form990</u> for the latest information	OMB No 1545-0047
		2018
Name of the organization HURDLE HILL FOUNDATION C/O WOODSTOCK SERVICES CO LLC		Employer identification number 04-6012782

Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. . . . ▶ \$ _____

Caution. An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization HURDLE HILL FOUNDATION C/O WOODSTOCK SERVICES CO LLC	Employer identification number 04-6012782
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Part I Contributors (See instructions) Use duplicate copies of Part I if additional space is needed			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	WILLIAM L PHIPPEN	\$ 13,935	Person ☐
	WOODSTOCK SERVICES CO LLC 101 ARCH		Payroll ☐
	BOSTON, MA 02110		Noncash ☒ (Complete Part II for noncash contributions)
2	DAVID O PHIPPEN	\$ 7,981	Person ☐
	WOODSTOCK SERVICES CO LLC 101 ARCH		Payroll ☐
	BOSTON, MA 02110		Noncash ☒ (Complete Part II for noncash contributions)
3	ANNE W PHIPPEN	\$ 6,967	Person ☐
	WOODSTOCK SERVICES CO LLC 101 ARCH		Payroll ☐
	BOSTON, MA 02110		Noncash ☒ (Complete Part II for noncash contributions)
4	JOANNA L PHIPPEN	\$ 12,122	Person ☐
	WOODSTOCK SERVICES CO LLC 101 ARCH		Payroll ☐
	BOSTON, MA 02110		Noncash ☒ (Complete Part II for noncash contributions)
5	HENRY P PHIPPEN	\$ 7,107	Person ☐
	WOODSTOCK SERVICES CO LLC 101 ARCH		Payroll ☐
	BOSTON, MA 02110		Noncash ☒ (Complete Part II for noncash contributions)
6	PETER D PHIPPEN	\$ 7,455	Person ☐
	WOODSTOCK SERVICES CO LLC 101 ARCH		Payroll ☐
	BOSTON, MA 02110		Noncash ☒ (Complete Part II for noncash contributions)

Name of organization HURDLE HILL FOUNDATION C/O WOODSTOCK SERVICES CO LLC	Employer identification number 04-6012782
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Part II **Noncash Property** (See instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
—	See Additional Data Table	\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
—		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
—		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
—		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
—		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
—		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
—		\$	

Name of organization HURDLE HILL FOUNDATION C/O WOODSTOCK SERVICES CO LLC	Employer identification number 04-6012782
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Part III	Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$ _____ Use duplicate copies of Part III if additional space is needed
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(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee

Additional Data

Software ID:
Software Version:
EIN: 04-6012782
Name: HURDLE HILL FOUNDATION
C/O WOODSTOCK SERVICES CO LLC

Form 990 Schedule B, Part II - Noncash Property (see Instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
<u>1</u>	80 SHS MCDONALDS CORP CUSIP#580135101	<u>\$ 13,935</u>	<u>2018-10-29</u>
<u>2</u>	5 SHS MCDONALDS CORP CUSIP#580135101	<u>\$ 940</u>	<u>2018-11-30</u>
<u>2</u>	40 SHS MCDONALDS CORP CUSIP#580135101	<u>\$ 7,041</u>	<u>2018-10-30</u>
<u>3</u>	40 SHS MCDONALDS CORP CUSIP#580135101	<u>\$ 6,967</u>	<u>2018-10-11</u>
<u>4</u>	65 SHS MCDONALDS CORP CUSIP#580135101	<u>\$ 12,122</u>	<u>2018-12-04</u>
<u>5</u>	40 SHS MCDONALDS CORP CUSIP#580135101	<u>\$ 7,107</u>	<u>2018-10-31</u>
<u>6</u>	40 SHS MCDONALDS CORP CUSIP#580135101	<u>\$ 7,455</u>	<u>2018-11-28</u>