

EXTENDED TO NOVEMBER 15, 2019

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

Return of Private Foundation

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

Do not enter social security numbers on this form as it may be made public

Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No 1545-0052

2018

Open to Public Inspection

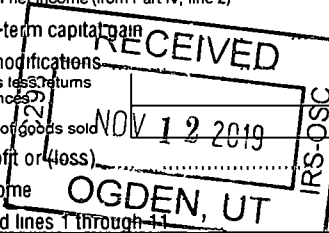
For calendar year 2018 or tax year beginning , and ending

Name of foundation PAUL & EDITH BABSON FOUNDATION C/O WILMINGTON TRUST 106846-000		A Employer identification number 04-6037891
Number and street (or P.O. box number if mail is not delivered to street address) 1100 NORTH MARKET STREET DE3-070		B Telephone number (617) 457-2050
City or town, state or province, country, and ZIP or foreign postal code WILMINGTON, DE 19890-001		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) \$ 11,980,606. (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))		(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 ☒ if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		325,575.	325,166.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		1,452,517.			
b Gross sales price for all assets on line 6a 3,931,924.			1,452,517.		
7 Capital gain net income (from Part IV, line 2)					
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		2,851.	0.		STATEMENT 2
12 Total. Add lines 1 through 11		1,780,943.	1,777,683.		
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					
c Other professional fees STMT 3		104,245.	73,840.		30,405.
17 Interest					
18 Taxes STMT 4		14,452.	3,352.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 5		157.	32.		125.
24 Total operating and administrative expenses. Add lines 13 through 23		118,854.	77,224.		30,530.
25 Contributions, gifts, grants paid		600,737.			600,737.
26 Total expenses and disbursements. Add lines 24 and 25		719,591.	77,224.		631,267.
27 Subtract line 26 from line 12		1,061,352.			
a Excess of revenue over expenses and disbursements			1,700,459.		
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)				N/A	

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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	431,772.	71,027.	71,027.
	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 - US and state government obligations			
	b Investments - corporate stock STMT 7	4,241,694.	4,328,434.	9,050,244.
	c Investments - corporate bonds			
	Liabilities	11 Investments - land, buildings, and equipment basis		
Less accumulated depreciation				
12 Investments - mortgage loans				
13 Investments - other STMT 8		1,600,743.	2,936,480.	2,859,335.
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)		6,274,209.	7,335,941.	11,980,606.
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.		
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	6,274,209.	7,335,941.	
	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	6,274,209.	7,335,941.		
31 Total liabilities and net assets/fund balances	6,274,209.	7,335,941.		

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	6,274,209.
2 Enter amount from Part I, line 27a	2	1,061,352.
3 Other increases not included in line 2 (itemize) SEE STATEMENT 6	3	5,785.
4 Add lines 1, 2, and 3	4	7,341,346.
5 Decreases not included in line 2 (itemize) 2019 INCOME REPORTED IN 2018	5	5,405.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	7,335,941.

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 SALES OF SECURITIES	P	VARIOUS	12/31/18
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 3,928,089.		2,479,407.	1,448,682.
b 3,835.			3,835.
c			
d			
e			

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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			1,448,682.
b			3,835.
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	1,452,517.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8	{ }	3	N/A

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	667,133.	12,949,341.	.051519
2016	618,284.	12,322,798.	.050174
2015	605,988.	12,500,878.	.048476
2014	620,393.	12,878,899.	.048171
2013	590,760.	11,991,968.	.049263

2 Total of line 1, column (d)	2	.247603
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	.049521
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	12,718,468.
5 Multiply line 4 by line 3	5	629,831.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	17,005.
7 Add lines 5 and 6	7	646,836.
8 Enter qualifying distributions from Part XII, line 4	8	631,267.

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)		1	34,009.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations, enter 4% of Part I, line 12, col (b)			
2 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	34,009.
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	34,009.
6 Credits/Payments			
a 2018 estimated tax payments and 2017 overpayment credited to 2018		6a	6,500.
b Exempt foreign organizations - tax withheld at source		6b	0.
c Tax paid with application for extension of time to file (Form 8868)		6c	36,500.
d Backup withholding erroneously withheld		6d	0.
7 Total credits and payments Add lines 6a through 6d		7	43,000.
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	8,991.
11 Enter the amount of line 10 to be Credited to 2019 estimated tax		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 ☐ \$ 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		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 ☐ 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

N/A

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? Website address N/A	X	
14 The books are in care of WILMINGTON TRUST Telephone no 302-651-1040 Located at 1100 NORTH MARKET STREET, WILMINGTON, DE ZIP+4 19890-0001		
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? See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the name of the foreign country N/A		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? ☐ 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 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? ☐ Yes ☒ 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 N/A		
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) 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

Form **990-PF** (2018)

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 Organizations relying on a current notice regarding disaster assistance, check here	N/A	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)	N/A ☐ 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 X
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No	
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A	7b
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	☐ Yes ☒ No	

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, and foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JAMES BABSON C/O 1100 NORTH MARKET STREET DE3-070 WILMINGTON, DE 19890-0900	TRUSTEE 1.00	0.	0.	0.
SENANI BABSON C/O 1100 NORTH MARKET STREET DE3-070 WILMINGTON, DE 19890-0900	TRUSTEE 1.00	0.	0.	0.
NEWELL FLATHER C/O GMA FOUNDATION 2 LIBERTY SQUARE, SUITE 500 BOSTON, MA 02109	TRUSTEE 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

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

Total number of others receiving over \$50,000 for professional services	0
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Expenses

Amount

Total. Add lines 1 through 3	0.
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7

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	12,671,741.
b	Average of monthly cash balances	1b	240,409.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	12,912,150.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	12,912,150.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	193,682.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	12,718,468.
6	Minimum investment return. Enter 5% of line 5	6	635,923.

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	635,923.
2a	Tax on investment income for 2018 from Part VI, line 5	2a	34,009.
b	Income tax for 2018 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	34,009.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	601,914.
4	Recoveries of amounts treated as qualifying distributions	4	2,000.
5	Add lines 3 and 4	5	603,914.
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	603,914.

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	631,267.
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	631,267.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	631,267.

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				603,914.
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				
b From 2014				
c From 2015				
d From 2016	3,898.			
e From 2017	26,252.			
f Total of lines 3a through e	30,150.			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ 631,267.				
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				603,914.
e Remaining amount distributed out of corpus	27,353.			
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:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	57,503.			
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	0.			
9 Excess distributions carryover to 2019 Subtract lines 7 and 8 from line 6a	57,503.			
10 Analysis of line 9				
a Excess from 2014				
b Excess from 2015				
c Excess from 2016	3,898.			
d Excess from 2017	26,252.			
e Excess from 2018	27,353.			

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

1 a 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 foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2018	(b) 2017	(c) 2016	(d) 2015	
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
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					
3 Subtract line 2d from line 2c. 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))

NONE

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

NONE

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

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

GMA FOUNDATIONS ATTN: HANNAH BLAISDELL, 617-426-7075
2 LIBERTY SQUARE, SUITE 500, BOSTON, MA 02109

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

TWO COPIES OF THE AGM OR NGG COMMON GRANT APPLICATION

c Any submission deadlines

POSTMARKED BY APRIL 1 OR SEPT 25

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

WITH FEW EXCEPTIONS, PREFERENCE IS GIVEN TO MASSACHUSETTS CHARITIES AND EDUCATIONAL ORGANIZATIONS

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

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
a Paid during the year				
350.ORG 20 JAY STREET, SUITE 732 BROOKLYN, NY 11201	NONE	PC	GENERAL SUPPORT	1,000.
ACCION EAST 10 FAWCETT STREET, SUITE 204 CAMBRIDGE, MA 02138	NONE	PC	GENERAL SUPPORT	3,000.
AFRICAN COMMUNITY ECONOMIC DEVELOPMENT OF NEW ENGLAND 89 SOUTH STREET, SUITE 203 BOSTON, MA 02111	NONE	PC	GENERAL SUPPORT	2,000.
ALZHEIMER S ASSOCIATION MA/NH CHAPTER 225 NORTH MICHIGAN AVENUE CHICAGO, IL 60601	NONE	PC	GENERAL SUPPORT	1,000.
AMERICAN CANCER SOCIETY, INC. 30 SPEEN STREET FRAMINGHAM, MA 01701	NONE	PC	GENERAL SUPPORT	1,000.
Total	SEE CONTINUATION SHEET(S)			600,737.
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 OF CHRIST CHURCH 3900 NY STATE ROUTE 22 WILLSBORO, NY 12996	NONE	PC	GENERAL SUPPORT	1,000.
AMERICAN FRIENDS OF CHRIST CHURCH 3900 NY STATE ROUTE 22 WILLSBORO, NY 12996	NONE	PC	GENERAL SUPPORT	1,000.
AMERICAN FRIENDS OF CHRIST CHURCH 3900 NY STATE ROUTE 22 WILLSBORO, NY 12996	NONE	PC	GENERAL SUPPORT	8,000.
AMERICAN FRIENDS SERVICE COMMITTEE 1501 CHERRY STREET PHILADELPHIA, PA 19102	NONE	PC	GENERAL SUPPORT	1,000.
AMERICANS FOR OXFORD, INC. 500 FIFTH AVENUE, 32ND FLOOR NEW YORK, NY 10110	NONE	PC	GENERAL SUPPORT	1,000.
ARLINGTON STREET CHURCH 351 BOYLSTON STREET BOSTON, MA 02116	NONE	PC	GENERAL SUPPORT	5,000.
ASIAN AMERICAN CIVIC ASSOCIATION 87 TYLER STREET, 5TH FLOOR BOSTON, MA 02111	NONE	PC	GENERAL SUPPORT	4,000.
ASSOCIATED GRANT MAKERS 133 FEDERAL STREET, SUITE 802 BOSTON, MA 02110	NONE	PC	GENERAL SUPPORT	12,000.
BABSON COLLEGE 231 FOREST STREET BABSON PARK, MA 02457	NONE	PC	GENERAL SUPPORT	5,000.
BABSON COLLEGE 231 FOREST STREET BABSON PARK, MA 02457	NONE	PC	GENERAL SUPPORT	5,000.
Total from continuation sheets				592,737.

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
BABSON COLLEGE 231 FOREST STREET BABSON PARK, MA 02457	NONE	PC	GENERAL SUPPORT	1,000.
BABSON COLLEGE 231 FOREST STREET BABSON PARK, MA 02457	NONE	PC	GENERAL SUPPORT	10,000.
BAGLY, INC. 14 BEACON STREET, SUITE 620 BOSTON, MA 02108	NONE	PC	GENERAL SUPPORT	5,000.
BALLETROX P.O. BOX 301334 JAMAICA PLAIN, MA 02130	NONE	PC	GENERAL SUPPORT	3,000.
BLACK MINISTERIAL ALLIANCE OF GREATER BOSTON 2010 COLUMBUS AVENUE ROXBURY, MA 02119	NONE	PC	GENERAL SUPPORT	4,000.
BOSTON CHINATOWN NEIGHBORHOOD CENTER 885 WASHINGTON STREET BOSTON, MA 02111	NONE	PC	GENERAL SUPPORT	3,000.
BOSTON GAY MEN'S CHORUS 539 TREMONT STREET BOSTON, MA 02116	NONE	PC	GENERAL SUPPORT	20,000.
BOSTON HEALTH CARE FOR THE HOMELESS PROGRAM INC. 780 ALBANY STREET BOSTON, MA 02118	NONE	PC	GENERAL SUPPORT	1,000.
BOSTON LANDMARKS ORCHESTRA 545 CONCORD AVENUE, SUITE 318 CAMBRIDGE, MA 02138	NONE	PC	GENERAL SUPPORT	3,000.
BOSTON LANDMARKS ORCHESTRA 545 CONCORD AVENUE, SUITE 318 CAMBRIDGE, MA 02138	NONE	PC	GENERAL SUPPORT	1,000.
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
BOSTON LANDMARKS ORCHESTRA, INC. 214 LINCOLN STREET, SUITE 331 BOSTON, MA 02134	NONE	PC	GENERAL SUPPORT	1,000.
BOSTON LOCAL DEVELOPMENT CORP FBO BOSTON TAX HELP COALITION 43 HAWKINS STREET BOSTON, MA 02114	NONE	PC	GENERAL SUPPORT	5,000.
BOSTON LYRIC OPERA COMPANY 11 AVENUE DE LAFAYETTE BOSTON, MA 02111	NONE	PC	GENERAL SUPPORT	13,422.
BOSTON SCORES 29 GERMANIA STREET JAMAICA PLAIN, MA 02130	NONE	PC	GENERAL SUPPORT	4,000.
BOSTON SYMPHONY ORCHESTRA, INC. 301 MASSACHUSETTS AVENUE BOSTON, MA 02115	NONE	PC	GENERAL SUPPORT	1,000.
BRADY CENTER TO PREVENT GUN VIOLENCE 840 FIRST STREET NE, SUITE 400 WASHINGTON, DC 20002	NONE	PC	GENERAL SUPPORT	1,000.
BRITISH SCHOOLS AND UNIVERSITIES 575 MADISON AVENUE, SUITE 1006 NEW YORK, NY 10022	NONE	PC	GENERAL SUPPORT	2,000.
BUSINESSES UNITED IN INVESTING LENDING AND DEVELOPING (BUILD) 745 ATLANTIC AVENUE, 8TH FLOOR BOSTON, MA 02111	NONE	PC	GENERAL SUPPORT	5,000.
CAMBRIDGE IN AMERICA FBO CLARE COLLEGE, CAMBRIDGE, ENGLAND P.O. BOX 9123, JAF BLG NEW YORK, NY 10087-9123	NONE	PC	GENERAL SUPPORT	1,000.
CAREER COLLABORATIVE, INC. 77 SUMMER STREET, 11TH FLOOR BOSTON, MA 02110	NONE	PC	GENERAL SUPPORT	3,000.
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
CHAMBER ORCHESTRA OF BOSTON, INC 263 COMMONWEALTH AVENUE, APT. 7 BOSTON, MA 02116	NONE	PC	GENERAL SUPPORT	2,000.
CHAMELEON ARTS ENSEMBLE OF BOSTON 6 ROCKY NOOK TERRACE BOSTON, MA 02130	NONE	PC	GENERAL SUPPORT	3,000.
CHARLES RIVER WATERSHED ASSOCIATION, INC. 190 PARK ROAD WESTON, MA 02493	NONE	PC	GENERAL SUPPORT	1,000.
CHILDREN S DEFENSE FUND 25 E STREET NW WASHINGTON, DC 20001	NONE	PC	GENERAL SUPPORT	1,000.
CODMAN ACADEMY FOUNDATION 637 WASHINGTON STREET DORCHESTER, MA 02124	NONE	PC	GENERAL SUPPORT	5,000.
COMMONWEALTH SHAKESPEARE COMPANY 231 FOREST STREET DORCHESTER, MA 02124	NONE	PC	GENERAL SUPPORT	4,000.
COMMONWEALTH ZOOLOGICAL CORPORATION ONE FRANKLIN PARK ROAD BOSTON, MA 02121	NONE	PC	GENERAL SUPPORT	2,000.
COMMUNITY FARMS OUTREACH 240 BEAVER STREET WALTHAM, MA 02452	NONE	PC	GENERAL SUPPORT	5,000.
COMMUNITY SERVICE CARE P.O. BOX 300040 JAMAICA PLAIN, MA 02130	NONE	PC	GENERAL SUPPORT	4,000.
COMPASS WORKING CAPITAL, INC. 89 SOUTH STREET, SUITE 804 BOSTON, MA 02111	NONE	PC	GENERAL SUPPORT	4,000.
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
COOLIDGE CORNER THEATRE FOUNDATION 290 HARVARD STREET BROOKLINE, MA 02446	NONE	PC	GENERAL SUPPORT	5,000.
CORPORATE ANGEL NETWORK, INC. 1 LOOP ROAD WHITE PLAINS, NY 10604	NONE	PC	GENERAL SUPPORT	2,000.
CULTURAL SURVIVAL, INC P.O. BOX 381569 CAMBRIDGE, MA 02238	NONE	PC	GENERAL SUPPORT	4,000.
DANA HALL SCHOOLS P.O. BOX 9010 WELLESLEY, MA 02482	NONE	PC	GENERAL SUPPORT	10,000.
DORCHESTER BAY ECONOMIC DEVELOPMENT CORPORATION 594 COLUMBIA ROAD, SUITE 302 DORCHESTER, MA 02125	NONE	PC	GENERAL SUPPORT	5,000.
DUDLEY STREET NEIGHBORHOOD INITIATIV 504 DUDLEY STREET ROXBURY, MA 02119	NONE	PC	GENERAL SUPPORT	1,000.
EAST BOSTON ECUMENICAL COMMUNITY COUNCIL 50 MERIDAN STREET, B1 EAST BOSTON, MA 02128	NONE	PC	GENERAL SUPPORT	4,000.
EASTIE FARM 213 WEBSTER STREET, APT. 2 EAST BOSTON, MA 02128	NONE	PC	GENERAL SUPPORT	3,000.
ECONOMIC MOBILITY PATHWAYS 1 WASHINGTON MALL, 3RD FLOOR BOSTON, MA 02108	NONE	PC	GENERAL SUPPORT	1,000.
ELIZABETH STONE HOUSE, INC. P.O. BOX 300039 JAMAICA PLAIN, MA 02130	NONE	PC	GENERAL SUPPORT	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
EMERSON COLLEGE D/B/A ARTSEMERSON 120 BOYLSTON STREET BOSTON, MA 02116	NONE	PC	GENERAL SUPPORT	3,000.
EMORY UNIVERSITY 1762 CLIFTON ROAD, SUITE 1400 ATLANTA, GA 30322	NONE	PC	GENERAL SUPPORT	1,000.
EMORY UNIVERSITY 1762 CLIFTON ROAD, SUITE 1400 ATLANTA, GA 30322	NONE	PC	GENERAL SUPPORT	5,000.
ENGLISH FOR NEW BOSTONIANS 105 CHAUNCEY STREET, 4TH FLOOR BOSTON, MA 02111	NONE	PC	GENERAL SUPPORT	3,000.
ENVIRONMENT MASSACHUSETTS RESEARCH AND POLICY CENTER 294 WASHINGTON STREET, SUITE 500 BOSTON, MA 02108	NONE	PC	GENERAL SUPPORT	4,000.
ENVIRONMENTAL DEFENSE FUND, INC. 257 PARK AVENUE SOUTH, 17TH FLOOR NEW YORK, NY 10010	NONE	PC	GENERAL SUPPORT	5,000.
EPIPHANY SCHOOL 154 CENTRE STREET DORCHESTER, MA 02124	NONE	PC	GENERAL SUPPORT	5,000.
ESPLANADE ASSOCIATION, INC. 376 BOYLSTON STREET, SUITE 503 BOSTON, MA 02116	NONE	PC	GENERAL SUPPORT	1,000.
FIVE COLLEGES INCORPORATED 97 SPRING STREET AMHERST, MA 01002	NONE	PC	GENERAL SUPPORT	2,500.
FONKOZE USA 1718 CONNECTICUT AVENUE NW SUITE 201 WASHINGTON, DC 20009	NONE	PC	GENERAL SUPPORT	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
FRIENDS OF COPLEY SQUARE, INC. P.O. BOX 170124 BOSTON, MA 02117	NONE	PC	GENERAL SUPPORT	1,000.
FRIENDS OF THE CHILDREN- BOSTON 555 AMORY STREET BOSTON, MA 02130	NONE	PC	GENERAL SUPPORT	5,000.
FRIENDS OF THE PUBLIC GARDEN 69 BEACON STREET BOSTON, MA 02108	NONE	PC	GENERAL SUPPORT	1,000.
FRIENDS OF THE SOUTH HADLEY PUBLIC LIBRARY SYSTEM 2 CANAL STREET SOUTH HADLEY, MA 01075	NONE	PC	GENERAL SUPPORT	2,500.
FROM THE TOP, INC. 140 CLARENDON STREET, SUITE 301 BOSTON, MA 02116	NONE	PC	GENERAL SUPPORT	1,000.
FUND FOR SOUTHERN COMMUNITIES 4153-C FLAT SHOALS PARKWAY DECATUR, GA 30034	NONE	PC	GENERAL SUPPORT	1,500.
GEDAKINA, INC P.O. BOX 2363 AMHERST, MA 01004	NONE	PC	GENERAL SUPPORT	5,000.
GLOUCESTER MARITIME HERITAGE CENTER 23 HARBOR LOOP GLOUCESTER, MA 01930	NONE	PC	GENERAL SUPPORT	4,000.
GRASSROOTS INTERNATIONAL 179 BOYLSTON STREET, 4TH FLOOR BOSTON, MA 02130	NONE	PC	GENERAL SUPPORT	2,000.
GREENROOTS, INC. 227 MARGINAL STREET, SUITE 1 CHLESEA, MA 02150	NONE	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
HALEY HOUSE, INC. 23 DARTMOUTH STREET BOSTON, MA 02116	NONE	PC	GENERAL SUPPORT	3,000.
HAVEN PROJECT, INC. 57 MUNROE STREET LYNN, MA 01901	NONE	PC	GENERAL SUPPORT	4,000.
HAYMARKET PEOPLE S FUND 42 SEAVERNS AVENUE BOSTON, MA 02130	NONE	PC	GENERAL SUPPORT	5,000.
HISTORIC DEERFIELD, INC. P.O. BOX 321 DEERFIELD, MA 01342	NONE	PC	GENERAL SUPPORT	5,000.
HUMAN RIGHTS WATCH, INC. 350 FIFTH AVENUE, 34TH FLOOR NEW YORK, NY 10118	NONE	PC	GENERAL SUPPORT	1,000.
HUMAN RIGHTS WATCH, INC. 350 FIFTH AVENUE, 34TH FLOOR NEW YORK, NY 10118	NONE	PC	GENERAL SUPPORT	3,000.
IC FOUNDATION FBO INVESTORS' CIRCLE P.O. BOX 3612 DURHAM, NC 27702	NONE	PC	GENERAL SUPPORT	3,000.
IMMIGRANT FAMILY SERVICES INSTITUTE 5 JALLEISON STREET HYDE PARK, MA 02136	NONE	PC	GENERAL SUPPORT	4,000.
INSTITUTE FOR GLOBAL YOUTH DEVELOPMENT AND PREVENTION PROGRAMS FBO WEATOC, INC. ROXBURY, MA 02119	NONE	PC	GENERAL SUPPORT	5,000.
INSTITUTE FOR POLICY STUDIES 30 GERMANIA, BUILDING L JAMAICA PLAIN, MA 02130	NONE	PC	GENERAL SUPPORT	4,000.
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
INTERNATIONAL BUDDHIST CENTER 2600 ELMONT STREET WHEATON, MD 20902	NONE	PC	GENERAL SUPPORT	2,000.
INTERNATIONAL INSTITUTE OF NEW ENGLAND 2 BOYLSTON STREET, 3RD FLOOR BOSTON, MA 02116	NONE	PC	GENERAL SUPPORT	5,000.
INVERSANT, INC. 561 BOYLSTON STREET, 4TH FLOOR BOSTON, MA 02116	NONE	PC	GENERAL SUPPORT	6,000.
INVERSANT, INC. 561 BOYLSTON STREET, 4TH FLOOR BOSTON, MA 02116	NONE	PC	GENERAL SUPPORT	1,000.
JEREMIAH PROGRAM 615 FIRST AVENUE NE, SUITE 210 MINNEAPOLIS, MN 55413	NONE	PC	GENERAL SUPPORT	4,000.
JETPAC RESOURCE CENTER, INC. 720 MASSACHUSETTS AVENUE, SUITE 8 CAMBRIDGE, MA 02139	NONE	PC	GENERAL SUPPORT	4,000.
JEWSH VOCATIONAL SERVICE, INC. 75 FEDERAL STREET, 3RD FLOOR BOSTON, MA 02110	NONE	PC	GENERAL SUPPORT	5,000.
JOSIAH QUINCY ORCHESTRA PROGRAM 885 WASHINGTON STREET BOSTON, MA 02111	NONE	PC	GENERAL SUPPORT	2,000.
JUSTICE RESOURCE INSTITUTE, INC. 160 GOULD STREET, SUITE 300 NEEDHAM, MA 02494	NONE	PC	GENERAL SUPPORT	3,000.
LA PINATA LATIN AMERICAN CULTURAL FAMILIES NETWORK 294 SOUTH STREET JAMAICA PLAIN, MA 02130	NONE	PC	GENERAL SUPPORT	1,500.
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
LA VIDA, INC. 40 GREEN STREET LYNN, MA 01902	NONE	PC	GENERAL SUPPORT	4,000.
LENA PARK COMMUNITY DEVELOPMENT CORPORATION 150 AMERICAN LEGION HIGHWAY DORCHESTER, MA 02124	NONE	PC	GENERAL SUPPORT	3,000.
LOUIS D. BROWN PEACE INSTITUTE 15 CHRISTOPHER STREET DORCHESTER, MA 02122	NONE	PC	GENERAL SUPPORT	2,000.
MARGARET FULLER NEIGHBORHOOD HOUSE 71 CHERRY STREET CAMBRIDGE, MA 02139	NONE	PC	GENERAL SUPPORT	5,000.
MASSACHUSETTS AUDUBON SOCIETY, INC. 208 SOUTH GREAT ROAD LINCOLN, MA 01773	NONE	PC	GENERAL SUPPORT	1,000.
MASSACHUSETTS CENTER FOR NATIVE AMERICAN AWARENESS, INC. P.O. BOX 5885 BOSTON, MA 02114	NONE	PC	GENERAL SUPPORT	5,000.
MASSACHUSETTS FOUNDATION FOR THE HUMANITIES 66 BRIDGE STREET NORTHAMPTON, MA 01060	NONE	PC	GENERAL SUPPORT	3,000.
MASSACHUSETTS HISTORICAL SOCIETY 1154 BOYLSTON STREET BOSTON, MA 02215	NONE	PC	GENERAL SUPPORT	1,000.
MERRIMACK VALLEY PROJECT, INC. 1045 ESSEX STREET LAWRENCE, MA 01841	NONE	PC	GENERAL SUPPORT	4,000.
METROPOLITAN OPERA ASSOCIATION, INC. 30 LINCOLN CENTER NEW YORK, NY 10023	NONE	PC	GENERAL SUPPORT	19,315.
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
MIAMI UNIVERSITY FOUNDATION, INC. 107 ROUDEBUSH HALL OXFORD, OH 45056	NONE	PC	GENERAL SUPPORT	5,000.
MOTHERS FOR JUSTICE AND EQUALITY 184 DUDLEY STREET, SUITE 109 LL ROXBURY, MA 02119	NONE	PC	GENERAL SUPPORT	3,000.
MT. TOBY MONTHLY MEETING - RELIGIOUS SOCIETY OF FRIENDS 194 LONG PLAIN ROAD LEVERETT, MA 01054	NONE	PC	GENERAL SUPPORT	1,000.
MUSEUM OF FINE ARTS 465 HUNTINGTON AVENUE BOSTON, MA 02115	NONE	PC	GENERAL SUPPORT	1,000.
MUSEUM OF SCIENCE 1 SCIENCE PARK BOSTON, MA 02114	NONE	PC	GENERAL SUPPORT	1,000.
MYSTIC LEARNING CENTER, INC. 530 MYSTIC AVENUE, ROOM 103 SOMERVILLE, MA 02145	NONE	PC	GENERAL SUPPORT	4,000.
MYSTIC RIVER WATERSHED ASSOCIATION 20 ACADEMY STREET, SUITE 306 ARLINGTON, MA 02476	NONE	PC	GENERAL SUPPORT	4,000.
NEW ECONOMY COALITION P.O. BOX 390503 CAMBRIDGE, MA 02139	NONE	PC	GENERAL SUPPORT	4,000.
NEW ENGLAND BUDDHIST VIHARA & MEDITATION CENTER 162 OLD UPTON ROAD GRAFTON, MA 01519	NONE	PC	GENERAL SUPPORT	3,500.
NEW HAMPSHIRE PUBLIC BROADCASTING 268 MAST ROAD DURHAM, NH 03824	NONE	PC	GENERAL SUPPORT	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
NIPPONZAN MYOHOJI NEW ENGLAND SANGHA 100 CAVE HILL ROAD LEVERETT, MA 01054	NONE	PC	GENERAL SUPPORT	1,000.
NIPPONZAN MYOHOJI NEW ENGLAND SANGHA 100 CAVE HILL ROAD LEVERETT, MA 01054	NONE	PC	GENERAL SUPPORT	3,000.
NIPPONZAN MYOHOJI USA 100 CAVE HILL ROAD LEVERETT, MA 01054	NONE	PC	GENERAL SUPPORT	1,000.
NOBLE AND GREENOUGH SCHOOL 10 CAMPUS DRIVE DEDHAM, MA 02026	NONE	PC	GENERAL SUPPORT	1,000.
NONVIOLENT PEACEFORCE 2610 UNIVERSITY AVENUE W, SUITE 550 SAINT PAUL, MN 55114	NONE	PC	GENERAL SUPPORT	1,000.
PARTNERS HOME CARE 281 WINTER STREET, SUITE 240 WALTHAM, MA 02451	NONE	PC	GENERAL SUPPORT	1,000.
PATHWAYS FOR CHILDREN, INC. 29 EMERSON AVENUE GLOUCESTER, MA 01930	NONE	PC	GENERAL SUPPORT	2,000.
PEACE ACTION EDUCATION FUND 8630 FENTON STREET, SUITE 524 SILVER SPRING, MD 20910	NONE	PC	GENERAL SUPPORT	3,500.
PERKINS SCHOOL FOR THE BLIND 175 NORTH BEACON STREET WATERTOWN, MA 02472	NONE	PC	GENERAL SUPPORT	2,000.
PRO ARTE CHAMBER ORCHESTRA OF BOSTON, INC. PO BOX 590295 NEWTON, MA 02459	NONE	PC	GENERAL SUPPORT	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
PROJECT HOPE, INC. 550 DUDLEY STREET ROXBURY, MA 02119	NONE	PC	GENERAL SUPPORT	5,000.
PURPLE HEART HOMES P.O. BOX 5535 STATESVILLE, NC 28687	NONE	PC	GENERAL SUPPORT	1,000.
RAW ART WORKS 37 CENTRAL SQUARE LYNN, MA 01901	NONE	PC	GENERAL SUPPORT	3,000.
RED TOMATO 300 MORTON AVENUE MARTINSVILLE, IN 46151	NONE	PC	GENERAL SUPPORT	1,000.
REHEARSAL FOR LIFE, INC. 670 CENTRE STREET, SUITE 8 JAMAICA PLAIN, MA 02130	NONE	PC	GENERAL SUPPORT	4,000.
RESTORATION PROJECT 334 PLEASANT STREET BELMONT, MA 02478	NONE	PC	GENERAL SUPPORT	4,000.
ROSIE S PLACE, INC. 889 HARRISON AVENUE BOSTON, MA 02118	NONE	PC	GENERAL SUPPORT	1,000.
SANDY HOOK PROMISE FOUNDATION P.O. BOX 3489 NEWTOWN, CT 06470	NONE	PC	GENERAL SUPPORT	1,000.
SARVODAYA USA 1127 UNIVERSITY AVENUE MADISON, WI 53715	NONE	PC	GENERAL SUPPORT	1,000.
SARVODAYA USA 1127 UNIVERSITY AVENUE MADISON, WI 53715	NONE	PC	GENERAL SUPPORT	1,500.
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
SARVODAYA USA 1127 UNIVERSITY AVENUE MADISON, WI 53715	NONE	PC	GENERAL SUPPORT	1,500.
SAVE THE HARBOR SAVE THE BAY 212 NORTHERN AVENUE, SUITE 304 BOSTON, MA 02210	NONE	PC	GENERAL SUPPORT	4,000.
SOCIEDAD LATINA, INC. 1530 TREMONT STREET ROXBURY, MA 02120	NONE	PC	GENERAL SUPPORT	5,000.
SOUTHERN POVERTY LAW CENTER, INC. 400 WASHINGTON AVENUE MONTGOMERY, AL 36104	NONE	PC	GENERAL SUPPORT	1,000.
SOUTHWEST BOSTON COMMUNITY DEVELOPMENT CORPORATION 11 FAIRMONT AVENUE, SUITE 101 HYDE PARK, MA 02136	NONE	PC	GENERAL SUPPORT	5,000.
SPECIAL OLYMPICS, INC. 1133 19TH STREET NW WASHINGTON, DC 20036	NONE	PC	GENERAL SUPPORT	1,000.
STANFORD UNIVERSITY FBO STANFORD FUND FOR UNDERGRADUATE EDUCATION PO BOX 20466 STANFORD, CA 94309-0466	NONE	PC	GENERAL SUPPORT	1,000.
STANFORD UNIVERSITY FBO STANFORD FUND FOR UNDERGRADUATE EDUCATION PO BOX 20466 STANFORD, CA 94309-0466	NONE	PC	GENERAL SUPPORT	1,000.
STANFORD UNIVERSITY FBO STANFORD FUND FOR UNDERGRADUATE EDUCATION PO BOX 20466 STANFORD, CA 94309-0466	NONE	PC	GENERAL SUPPORT	10,000.
STEPS TO SUCCESS P.O. BOX 470421 BROOKLINE, MA 02447	NONE	PC	GENERAL SUPPORT	1,000.
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
STRONG WOMEN, STRONG GIRLS 555 ARMORY STREET, SUITE # 3R-3 JAMAICA PLAIN, MA 02130	NONE	PC	GENERAL SUPPORT	3,000.
SUMMER SEARCH 101 HOWARD STREET, SUITE 250 SAN FRANCISCO, CA 94105	NONE	PC	GENERAL SUPPORT	2,000.
THE AMERICAN FUND FOR EMMANUEL 116 W MAIN STREET, SUITE 302 SALISBURY, MD 21801	NONE	PC	GENERAL SUPPORT	10,000.
THE AMERICAN INDIAN COLLEGE FUND 8333 GREENWOOD BOULEVARD DENVER, CO 80221	NONE	PC	GENERAL SUPPORT	10,000.
THE BOSTON EDUCATIONAL DEVELOPMENT FOUNDATION 7 PALMER STREET, 2ND FLOOR ROXBURY, MA 02119	NONE	PC	GENERAL SUPPORT	4,000.
THE BOSTON EDUCATIONAL DEVELOPMENT FOUNDATION 7 PALMER STREET, 2ND FLOOR ROXBURY, MA 02119	NONE	PC	GENERAL SUPPORT	4,000.
THE CITY SCHOOL 614 COLUMBIA ROAD DORCHESTER, MA 02125	NONE	PC	GENERAL SUPPORT	4,000.
THE HYDE SQUARE TASK FORCE P.O. BOX 301871 JAMAICA PLAIN, MA 02130	NONE	PC	GENERAL SUPPORT	5,000.
THE NOLUMBKA PROJECT P.O. BOX 285 GREENFIELD, MA 01302	NONE	PC	GENERAL SUPPORT	1,000.
THE PREPARATORY FOUNDATION YOUNG MAN WITH A PLAN BOSTON, MA 02136	NONE	PC	GENERAL SUPPORT	3,000.
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
THE SONTAG PRIZE IN URBAN EDUCATION 645 TREMONT STREET BOSTON, MA 02118	NONE	PC	GENERAL SUPPORT	5,000.
THEATREZONE, INC. 100 CAPTAINS ROW, APT. 306 CHELSEA, MA 02150	NONE	PC	GENERAL SUPPORT	4,000.
TRANSFORMATIVE CULTURE PROJECT 100R WARREN STREET BOSTON, MA 02119	NONE	PC	GENERAL SUPPORT	7,000.
TRUE STORY 21 LINWOOD STREET ARLINGTON, MA 02474	NONE	PC	GENERAL SUPPORT	2,000.
TRUSTEES OF DEERFIELD ACADEMY P.O. BOX 87 DEERFIELD, MA 01342	NONE	PC	GENERAL SUPPORT	1,000.
TSNE MISSIONWORKS FBO NEW ENTRY SUSTAINABLE FARMING 89 SOUTH STREET, SUITE 700 BOSTON, MA 02111	NONE	PC	GENERAL SUPPORT	4,000.
TSNE MISSIONWORKS FBO THE CARROT PROJECT 89 SOUTH STREET, SUITE 700 BOSTON, MA 02111	NONE	PC	GENERAL SUPPORT	4,000.
UASPIRE 31 MILK STREET, SUITE 900 BOSTON, MA 02109	NONE	PC	GENERAL SUPPORT	3,000.
UNITED NATIONS ASSOCIATION OF GREATER BOSTON 85 DEVONSHIRE STREET, SUITE 1000 BOSTON, MA 02109	NONE	PC	GENERAL SUPPORT	3,000.
UNIVERSITY OF MASSACHUSETTS BOSTON 1 BEACON STREET, 31ST FLOOR BOSTON, MA 02108	NONE	PC	GENERAL SUPPORT	1,000.
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
UNIVERSITY OF VIRGINIA LAW SCHOOL FOUNDATION 580 MASSIE ROAD CHARLOTTESVILLE, VA 22903	NONE	PC	GENERAL SUPPORT	5,000.
VETERANS EDUCATION PROJECT INC P.O. BOX 416 AMHERST, MA 01004	NONE	PC	GENERAL SUPPORT	5,000.
VICTORY PROGRAMS, INC. 965 MASSACHUSETTS AVENUE BOSTON, MA 02118	NONE	PC	GENERAL SUPPORT	5,000.
VIETAID, INC. 42 CHARLES STREET, SUITE E DORCHESTER, MA 02122	NONE	PC	GENERAL SUPPORT	1,000.
VISUAL ART LIBRARY P.O. BOX 589 NEW LONDON, CT 06320	NONE	PC	GENERAL SUPPORT	1,000.
WARREN J PLAUT CHARITABLE TRUST PEACE AND JUSTICE GRANBY, MA 01033	NONE	PC	GENERAL SUPPORT	1,000.
WELLESLEY SCHOLARSHIP FOUNDATION P.O. BOX 81207 WELLESLEY, MA 02481	NONE	PC	GENERAL SUPPORT	4,000.
WELLSPRING HOUSE, INC. 302 ESSEX AVENUE GLOUCESTER, MA 01930	NONE	PC	GENERAL SUPPORT	4,000.
WGBH EDUCATIONAL FOUNDATION ONE GUEST STREET BOSTON, MA 02135	NONE	PC	GENERAL SUPPORT	2,000.
WRITEBOSTON 2300 WASHINGTON STREET ROXBURY, MA 02119	NONE	PC	GENERAL SUPPORT	3,000.
Total from continuation sheets				

3 Grants and Contributions Paid During the Year (Continuation)**Total from continuation sheets**

Enter gross amounts unless otherwise indicated

(See worksheet in line 13 instructions to verify calculations)

[illegible]

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

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

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527?

☐ Yes ☒ No

b If "Yes," complete the following schedule

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

**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.


Signature of officer or trustee

Date * 11/6/19

TRUSTEE
Title

May the IRS discuss this return with the preparer shown below? See instr

☒ Yes ☐ No

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
	FRANK SCHER	FRANK SCHER	10/30/19		P00440203
	Firm's name ► WILMINGTON TRUST COMPANY				Firm's EIN ► 51-0055023
	Firm's address ► 1100 N MARKET STREET DE3-C070 WILMINGTON, DE 19890-0001			Phone no 302-651-1040	

Form **990-PF** (2018)

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
CAPITAL GAIN					
DIVIDENDS	3,835.	3,835.	0.	0.	
INTEREST/DIVIDENDS	325,166.	0.	325,166.	325,166.	
OTHER NON TAXABLE INCOME	409.	0.	409.	0.	
TO PART I, LINE 4	329,410.	3,835.	325,575.	325,166.	

FORM 990-PF	OTHER INCOME	STATEMENT	2
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
EXCISE TAX REFUND	2,851.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	2,851.	0.	

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
WTC CUSTODIAL FEES	70,467.	70,467.		0.
DANA INVESTMENTS	2,873.	2,873.		0.
GMA FOUNDATIONS	29,905.	0.		29,905.
TAX PREPARATION	1,000.	500.		500.
TO FORM 990-PF, PG 1, LN 16C	104,245.	73,840.		30,405.

FORM 990-PF	TAXES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAX PAID	3,352.	3,352.		0.
CURRENT YEAR ESTIMATED EXCISE TAX PAYMENTS	2,100.	0.		0.
FEDERAL EXCISE TAXES PAID	9,000.	0.		0.
TO FORM 990-PF, PG 1, LN 18	14,452.	3,352.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MA AG FILING FEE	125.	0.		125.
DEPOSITORY FEE	32.	32.		0.
TO FORM 990-PF, PG 1, LN 23	157.	32.		125.

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	6
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DESCRIPTION	AMOUNT
2018 INCOME REPORTED IN 2017	3,785.
RETURN OF GRANTS MADE PRIOR YEAR	2,000.
TOTAL TO FORM 990-PF, PART III, LINE 3	5,785.

FORM 990-PF	CORPORATE STOCK	STATEMENT	7
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCK	4,328,434.	9,050,244.
TOTAL TO FORM 990-PF, PART II, LINE 10B	4,328,434.	9,050,244.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	8
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
OTHER INVESTMENTS	COST	2,936,480.	2,859,335.
TOTAL TO FORM 990-PF, PART II, LINE 13		2,936,480.	2,859,335.