

efile GRAPHIC print - DO NOT PROCESS

As Filed Data -

DLN: 93491318027299

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 01-01-2018, and ending 12-31-2018

Name of foundation
BIERLY BOASBERG FOUNDATION

Number and street (or P O box number if mail is not delivered to street address)
199 OTIS STREET

City or town, state or province, country, and ZIP or foreign postal code
NEWTON, MA 02465

G Check all that apply

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

H Check type of organization

☒ Section 501(c)(3) exempt private foundation

☐ Section 4947(a)(1) nonexempt charitable trust

☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 5,118,999

J Accounting method

☒ Cash

☐ Accrual

☐ Other (specify)

(Part I, column (d) must be on cash basis)

A Employer identification number
04-6903459

B Telephone number (see instructions)
(617) 572-2532

C If exemption application is pending, check here

D 1. Foreign organizations, check here

2 Foreign organizations meeting the 85% test, check here and attach computation

E If private foundation status was terminated under section 507(b)(1)(A), check here

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)	599,739		
	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	118,262	118,262	
	5a Gross rents			
	b Net rental income or (loss)			
	6a Net gain or (loss) from sale of assets not on line 10	383,822		
	b Gross sales price for all assets on line 6a			
		727,659		
	7 Capital gain net income (from Part IV, line 2)		383,822	
	8 Net short-term capital gain			
	9 Income modifications			
Operating and Administrative Expenses	10a Gross sales less returns and allowances			
	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	1,101,823	502,084	0
	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)			
	c Other professional fees (attach schedule)	38,993	38,993	0
	17 Interest			
	18 Taxes (attach schedule) (see instructions)	18,026	3,512	0
	19 Depreciation (attach schedule) and depletion			
	20 Occupancy			
	21 Travel, conferences, and meetings			
22 Printing and publications				
23 Other expenses (attach schedule)	700	75	0	
24 Total operating and administrative expenses. Add lines 13 through 23	57,719	42,580	0	
25 Contributions, gifts, grants paid	215,167		215,167	
26 Total expenses and disbursements. Add lines 24 and 25	272,886	42,580	0	
	27 Subtract line 26 from line 12			
	a Excess of revenue over expenses and disbursements	828,937		
	b Net investment income (if negative, enter -0-)		459,504	
c Adjusted net income (if negative, enter -0-)			0	

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form 990-PF (2018)

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	23,700	91,122	91,122
	2 Savings and temporary cash investments	7,439	55,948	55,948
	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)	3,676,449	4,008,968	4,523,171
	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)	421,455	475,538	448,758
	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)	4,129,043	4,631,576	5,118,999	
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		0	0	
28 Paid-in or capital surplus, or land, bldg , and equipment fund		0	0	
29 Retained earnings, accumulated income, endowment, or other funds		4,129,043	4,631,576	
30 Total net assets or fund balances (see instructions)	4,129,043	4,631,576		
31 Total liabilities and net assets/fund balances (see instructions) .	4,129,043	4,631,576		

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	4,129,043
2 Enter amount from Part I, line 27a	2	828,937
3 Other increases not included in line 2 (itemize) ▶ _____	3	0
4 Add lines 1, 2, and 3	4	4,957,980
5 Decreases not included in line 2 (itemize) ▶ _____	5	326,404
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	4,631,576

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	383,822
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	5,787

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	272,513	4,726,706	0 057654
2016	237,236	3,654,389	0 064918
2015	234,073	3,416,185	0 068519
2014	194,625	3,173,395	0 061330
2013	178,185	2,665,639	0 066845
2 Total of line 1, column (d)			2 0 319266
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 063853
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5			4 5,372,979
5 Multiply line 4 by line 3			5 343,081
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 4,595
7 Add lines 5 and 6			7 347,676
8 Enter qualifying distributions from Part XII, line 4			8 215,792

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	9,190
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	9,190
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	9,190
6	Credits/Payments		
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	8,400
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	12,000
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	20,400
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	11,210
11	Enter the amount of line 10 to be Credited to 2019 estimated tax ☐ 11,210 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 ▶ MARGARET BOASBERG Telephone no ▶ (617) 572-2532			

Located at **▶** 199 OTIS STREET NEWTON MAZIP+4 **▶** 02465

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ▶ ☐	15		
16	At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ▶	16	Yes	No

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.**

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ 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. ▶ ☐	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? If "Yes," list the years ▶ 20____, 20____, 20____, 20____ ☐ Yes ☒ No			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ 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	
Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐			
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	☐ Yes ☐ No		
<i>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</i>			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No	6b	No
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	☐ Yes ☒ No		
<i>If "Yes" to 6b, file Form 8870</i>			
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No	7b	
b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	☐ Yes ☒ No		
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
CHRISTOPHER BIERLY 199 OTIS STREET NEWTON, MA 02465	TRUSTEE 1 00	0	0	0
MARGARET BOASBERG 199 OTIS STREET NEWTON, MA 02465	TRUSTEE 2 00	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	5,373,768
b	Average of monthly cash balances.	1b	81,033
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	5,454,801
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	5,454,801
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	81,822
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	5,372,979
6	Minimum investment return. Enter 5% of line 5.	6	268,649

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	268,649
2a	Tax on investment income for 2018 from Part VI, line 5.	2a	9,190
b	Income tax for 2018 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	9,190
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	259,459
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	259,459
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	259,459

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	215,792
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	215,792
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	215,792

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				259,459
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.	48,086			
b	From 2014.	41,308			
c	From 2015.	67,044			
d	From 2016.	60,517			
e	From 2017.	44,511			
f	Total of lines 3a through e.	261,466			
4	Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ 215,792				
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.				215,792
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))	43,667			43,667
6	Enter the net total of each column as indicated below:				
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5	217,799			
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).	4,419			
9	Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	213,380			
10	Analysis of line 9				
a	Excess from 2014.	41,308			
b	Excess from 2015.	67,044			
c	Excess from 2016.	60,517			
d	Excess from 2017.	44,511			
e	Excess from 2018.				

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

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

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

	Tax year	Prior 3 years			(e) Total
	(a) 2018	(b) 2017	(c) 2016	(d) 2015	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
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 e-mail address of the person to whom applications should be addressed
MARGARET BOASBERG
199 OTIS STREET
NEWTON, MA 02456
(617) 965-3626

b The form in which applications should be submitted and information and materials they should include
NOT APPLICABLE

c Any submission deadlines
NOT APPLICABLE

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors
THE FOUNDATION MAKES CHARITABLE CONTRIBUTIONS ONLY FOR CHARITABLE, EDUCATIONAL OR SCIENTIFIC PURPOSES DEFINED BY SEC 501 (C) (3) OF THE INTERNAL REVENUE CODE

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

Form **990-PF** (2018)

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

	Yes	No
--	-----	----

1a(1)		No
1a(2)		No

--	--	--

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

1b(2)	No
-------	----

1b(3)	No
-------	----

1b(4)		No
-------	--	----

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

1b(6)		No
--------------	--	-----------

1c	No
----	----

value
ue

[illegible]

described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

(a) Name of organization	(b) Type of organization	(c) Description of relationship

***** 2019-11-14 *****
 Signature of officer or trustee Date Title
 (see instr.)? ☒ Yes ☐ No

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
	MARK MINASSIAN		2019-11-13		P00160936
	Firm's name ▶ BERRY DUNN MCNEIL & PARKER LLC				Firm's EIN ▶ 01-0523282
	Firm's address ▶ 51 SAWYER ROAD STE 610 WALTHAM, MA 02453				Phone no (617) 965-5959

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	MS 7594 - ST COVERED		2017-03-20	2018-01-16
1	MS 7594 - LT NONCOVERED		2011-06-29	2018-07-27
	MS 7594 - LT COVERED		2012-11-15	2018-07-27
	MS 2901 - ST COVERED		2018-10-06	2018-01-03
	MS 2901 - LT NONCOVERED		2009-12-24	2018-11-15
	CAPITAL GAINS DIVIDENDS	P		

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)
11,924		6,141	5,783
47,151		20,896	26,255
338,999		167,014	171,985
110		106	4
318,658		149,680	168,978
10,817			10,817

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			(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	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
			5,783
			26,255
			171,985
			4
			168,978
			10,817

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).

CHRISTOPHER BIERLY
MARGARET BOASBERG

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>				
ASCPA293 2ND AVE WALTHAM, MA 02451	NONE	PC	GENERAL DONATION	1,000
BAIN CAPITAL'S CHILDREN'S CHARITIES 111 HUNTINGTON AVENUE BOSTON, MA 02199	NONE	PC	GENERAL DONATION	15,000
BOSTON CHILDRENS HOSPIAL 1295 BOYLSTON ST BOSTON, MA 02215	NONE	PC	GENERAL DONATION	5,000
Total ► 3a				215,167

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>				
BOYS AND GIRLS CLUB OF BOSTON 200 HIGH STREET 3RD FLOOR BOSTON, MA 02110	NONE	PC	GENERAL DONATION	5,000
BRIGHAM & WOMENS75 FRANCIS ST BOSTON, MA 02115	NONE	PC	GENERAL DONATION	10,000
BUCKINGHAM BROWNE AND NICHOLS SCHOOL 80 GERRYS LANDING RD CAMBRIDGE, MA 02138	NONE	PC	GENERAL DONATION	35,000
Total ▶ 3a				215,167

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>				
CAMP HOLIDAY TRAILS 400 HOLIDAY TRAILS LN CHARLOTTESVILLE, VA 22903	NONE	PC	GENERAL DONATION	12,500
CENTER FOR SCIENCE IN THE PUBLIC INTEREST 1220 L ST NW 300 WASHINGTON, DC 20005	NONE	PC	GENERAL DONATION	25
CHALLENGED ATHLETES FOUNDATION 9591 WAPLES ST SAN DIEGO, CA 92121	NONE	PC	GENERAL DONATION	150
Total ▶ 3a				215,167

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>				
COMMUNITY FOUNDATION OF NANTUCKET 9 BAYBERRY CT NANTUCKET, MA 02554	NONE	PC	GENERAL DONATION	250
COMPASSIONATE CARE ALS 752 W FALMOUTH HWY FALMOUTH, MA 02540	NONE	PC	GENERAL DONATION	258
CONSTITUTION DAY CENTRE 55 CONSTITUTION RD CHARLESTOWN, MA 02129	NONE	PC	GENERAL DONATION	2,500
Total ▶ 3a				215,167

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>				
COURAGEOUS PARENTS NETWORK 21 ROCHESTER RD NEWTON, MA 02458	NONE	PC	GENERAL DONATION	1,000
CRADLES TO CRAYONS 155 N BEACON STREET BRIGHTON, MA 02135	NONE	PC	GENERAL DONATION	2,075
CULTURAL LANDSCAPE FOUNDATION 1711 CONNECTICUT AVE NW200 WASHINGTON, DC 20009	NONE	PC	GENERAL DONATION	1,000
Total ► 3a				215,167

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>				
DIANNA FOSSEY GORILLA FUND SUITE 200 ATLANTA, GA 30315	NONE	PC	GENERAL DONATION	7,500
DOCTORS WITHOUT BORDERS 333 7TH AVENUE NEW YORK, NY 10001	NONE	PC	GENERAL DONATION	9,000
ENDEAVOR GLOBAL900 BROADWAY NEW YORK, NY 10003	NONE	PC	GENERAL DONATION	7,500
Total ▶ 3a				215,167

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>				
EVERYTOWN FOR GUN SAFETY P O BOX 3886 NEW YORK, NY 10163	NONE	PC	GENERAL DONATION	1,000
FAIRWINDS - NANTUCKET'S COUNSELING CENTER 20 VESPER LN NANTUCKET, MA 02554	NONE	PC	GENERAL DONATION	250
FOUNDATION FIGHTING BLINDNESS 7168 COLUMBIA GATEWAY DRIVE SUITE 100 COLUMBIA, MD 21046	NONE	PC	GENERAL DONATION	200
Total			▶ 3a	215,167

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>				
INTERNATIONAL INSTITUTE OF NEW ENGLAND 2 BOYLSTON ST 3RD FLOOR BOSTON, MA 02116	NONE	PC	GENERAL DONATION	2,500
JDRF60 WALNUT ST 102 WELLESLEY, MA 02481	NONE	PC	GENERAL DONATION	100
JIMMY FUND WALK FOR CANCER 450 BROOKLINE AVE BOSTON, MA 02215	NONE	PC	GENERAL DONATION	900
Total ▶ 3a				215,167

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>				
JOSEPH MIDDLEMISS BIG HEART FOUNDATION PO BOX 428 DRACUT, MA 01826	NONE	PC	GENERAL DONATION	105
KELLY BROWN FOUNDATION 5 HAMILTON LANDING SUITE 200 NOVATO, CA 94949	NONE	PC	GENERAL DONATION	200
LEUKEMIA AND LYMPHOMA SOCIETY 70 WALNUT ST SUITE 301 WELLESLEY, MA 02481	NONE	PC	GENERAL DONATION	1,000
Total ▶ 3a				215,167

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>				
MASS GENERAL HOSPITAL55 FRUIT ST BOSTON, MA 02114	NONE	PC	GENERAL DONATION	10,000
MCLEAN HOSPITAL115 MILL ST BELMONT, MA 02478	NONE	PC	GENERAL DONATION	1,000
MEMORIAL SLOAN KETTERING CANCER CENTER 1275 YORK AVE NEW YORK, NY 10065	NONE	PC	GENERAL DONATION	500
Total ▶ 3a				215,167

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>				
NANTUCKET ANTHENEUM1 INDIA ST NANTUCKET, MA 02554	NONE	PC	GENERAL DONATION	250
NANTUCKET CONSERVATION FOUNDATION 118 CLIFF RD NANTUCKET, MA 02554	NONE	PC	GENERAL DONATION	2,000
NANTUCKET COTTAGE HOSPITAL 57 PROSPECT ST UNIT 1 NANTUCKET, MA 02554	NONE	PC	GENERAL DONATION	2,500
Total ► 3a				215,167

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>				
NANTUCKET DREAMLAND FOUNDATION 17 SOUTH WATER STREET NANTUCKET, MA 02554	NONE	PC	GENERAL DONATION	10,000
NATIONAL CATHEDRAL SCHOOL 3612 WOODLEY RD NW WASHINGTON DC, DC 20016	NONE	PC	GENERAL DONATION	250
NEWTON COMMUNITY PRIDE 1000 COMMONWEALTH AVENUE NEWTON, MA 02459	NONE	PC	GENERAL DONATION	100
Total ▶ 3a				215,167

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>				
NEWTON-WELLESLEY HOSPITAL CHARITABLE FOUNDATION 2014 WASHINGTON STREET NEWTON, MA 02462	NONE	PC	GENERAL DONATION	2,500
PAN MASS CHALLENGE77 4TH AVE NEEDHAM, MA 02494	NONE	PC	GENERAL DONATION	307
PARTNERS IN HEALTH 3RD FLOOR 888 COMMONWEALTH AVE BOSTON, MA 02215	NONE	PC	GENERAL DONATION	10,000
Total ▶ 3a				215,167

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				
POSITIVE COACHING ALLIANCE 1001 RENGSTORFF AVE 100 MOUNTAIN VIEW, CA 94043	NONE	PC	GENERAL DONATION	100
PROJECT BREAD WALK FOR HUNGER 145 BORDER ST BOSTON, MA 02128	NONE	PC	GENERAL DONATION	500
SANDY HOOK PROMISE 13 CHURCH HILL RD NEWTOWN, CT 06470	NONE	PC	GENERAL DONATION	200
Total ► 3a				215,167

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>				
SAVE THE CHILDREN 501 KINGS HWY E 400 FAIRFIELD, CT 06825	NONE	PC	GENERAL DONATION	13,072
SCONSET TRUST1 NEW ST SIASCONSET, MA 02564	NONE	PC	GENERAL DONATION	250
SQUASHBUSTERS795 COLUMBUS AVE ROXBURY CROSSING, MA 02120	NONE	PC	GENERAL DONATION	100
Total ▶ 3a				215,167

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>				
STANFORD GSB 655 KNIGHT WAY STANFORD CALIFORNIA, CA 94305	NONE	PC	GENERAL DONATION	500
SUMMIT SPELLAPALOOZA 4655 HANOVER AVENUE BOULDER, CO 80305	NONE	PC	GENERAL DONATION	50
SUMMITS EDUCATION250 SUMMER ST BOSTON, MA 02210	NONE	PC	GENERAL DONATION	1,000
Total ▶ 3a				215,167

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>				
TENACITY38 EVERETT ST BOSTON, MA 02134	NONE	PC	GENERAL DONATION	2,000
THE PARK SCHOOL171 GODDARD AVE BROOKLINE, MA 02445	NONE	PC	GENERAL DONATION	17,500
THE STEPPINGSTONE FOUNDATION 1 APPLETON ST BOSTON, MA 02116	NONE	PC	GENERAL DONATION	500
Total ▶ 3a				215,167

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>				
TOWN OF NAN SCHOLORSHIP FUND 16 BROAD ST NANTUCKET, MA 02554	NONE	PC	GENERAL DONATION	100
UNIVERSITY OF VIRGINIA - FUND FOR THE ARTS 1300 JEFFERSON PARK AVE CHARLOTTESVILLE, VA 22903	NONE	PC	GENERAL DONATION	2,500
UNIVERSITY OF VIRGINIA 1300 JEFFERSON PARK AVE CHARLOTTESVILLE, VA 22903	NONE	PC	GENERAL DONATION	5,000
Total ▶ 3a				215,167

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>				
URI FOUNDATION 79 UPPER COLLEGE RD KINGSTON, RI 02881	NONE	PC	GENERAL DONATION	1,000
WHITE HERON5 N WATER ST NANTUCKET, MA 02554	NONE	PC	GENERAL DONATION	9,750
YALE UNIVERSITY206 ELM ST NEW HAVEN, CT 06520	NONE	PC	GENERAL DONATION	625
Total ▶ 3a				215,167

TY 2018 Investments Corporate Stock Schedule**Name:** BIERLY BOASBERG FOUNDATION**EIN:** 04-6903459**Investments Corporation Stock Schedule**

Name of Stock	End of Year Book Value	End of Year Fair Market Value
MORGAN STANLEY - CORPORATE STOCK	4,008,968	4,523,171

TY 2018 Investments - Other Schedule

Name: BIERLY BOASBERG FOUNDATION

EIN: 04-6903459

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MORGAN STANLEY - MUTUAL FUNDS	AT COST	475,538	448,758

TY 2018 Other Decreases Schedule

Name: BIERLY BOASBERG FOUNDATION

EIN: 04-6903459

Description	Amount
RECLASS BEGINNING RETAINED EARNINGS	326,404

TY 2018 Other Expenses Schedule**Name:** BIERLY BOASBERG FOUNDATION**EIN:** 04-6903459**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK FEES	75	75	0	0
STATE FILING FEES	625	0	0	625

TY 2018 Other Professional Fees Schedule**Name:** BIERLY BOASBERG FOUNDATION**EIN:** 04-6903459

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	38,993	38,993	0	0

TY 2018 Taxes Schedule**Name:** BIERLY BOASBERG FOUNDATION**EIN:** 04-6903459

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	3,512	3,512	0	0
FEDERAL TAXES PAID	14,514	0	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 BIERLY BOASBERG FOUNDATION	Employer identification number 04-6903459
---	---

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 BIERLY BOASBERG FOUNDATION	Employer identification number 04-6903459
---	---

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
—	See Additional Data Table	\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
—		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
—		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
—		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
—		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
—		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
—		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
—		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)
—		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution)

Name of organization BIERLY BOASBERG FOUNDATION	Employer identification number 04-6903459
---	---

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 BIERLY BOASBERG FOUNDATION	Employer identification number 04-6903459
---	---

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
-----------------	--

(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: 04-6903459

Name: BIERLY BOASBERG FOUNDATION

Form 990 Schedule B, 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
<u>1</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 108,774	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA 02465		Noncash ☒ (Complete Part II for noncash contributions)
<u>2</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 200,913	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA 02465		Noncash ☒ (Complete Part II for noncash contributions)
<u>3</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 10,946	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA 02465		Noncash ☒ (Complete Part II for noncash contributions)
<u>4</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 9,345	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA 02465		Noncash ☒ (Complete Part II for noncash contributions)
<u>5</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 6,323	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA 02465		Noncash ☒ (Complete Part II for noncash contributions)
<u>6</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 7,265	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA 02465		Noncash ☒ (Complete Part II for noncash contributions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
<u>7</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 12,604	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA 02465		Noncash ☒ (Complete Part II for noncash contributions)
<u>8</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 9,095	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA 02465		Noncash ☒ (Complete Part II for noncash contributions)
<u>9</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 7,976	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA 02465		Noncash ☒ (Complete Part II for noncash contributions)
<u>10</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 9,306	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA 02465		Noncash ☒ (Complete Part II for noncash contributions)
<u>11</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 11,805	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA 02465		Noncash ☒ (Complete Part II for noncash contributions)
<u>12</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 21,528	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA 02465		Noncash ☒ (Complete Part II for noncash contributions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
<u>13</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 13,353	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA 02465		Noncash ☒ (Complete Part II for noncash contributions)
<u>14</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 1,578	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA 02465		Noncash ☒ (Complete Part II for noncash contributions)
<u>15</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 15,100	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA 02465		Noncash ☒ (Complete Part II for noncash contributions)
<u>16</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 46,771	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA 02465		Noncash ☒ (Complete Part II for noncash contributions)
<u>17</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 8,963	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA 02465		Noncash ☒ (Complete Part II for noncash contributions)
<u>18</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 33,194	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA 02465		Noncash ☒ (Complete Part II for noncash contributions)

Form 990 Schedule B, 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
<u>19</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 6,879	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA 02465		Noncash ☒ (Complete Part II for noncash contributions)
<u>20</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 10,049	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA 02465		Noncash ☒ (Complete Part II for noncash contributions)
<u>21</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 29,526	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA 02465		Noncash ☒ (Complete Part II for noncash contributions)
<u>22</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 12,417	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA 02465		Noncash ☒ (Complete Part II for noncash contributions)
<u>23</u>	CHRISTOPHER BIERLY AND MARGARET BOASBERG	\$ 6,029	Person ☒
	199 OTIS STREET		Payroll ☐
	NEWTON, MA 02465		Noncash ☒ (Complete Part II for noncash contributions)

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>	1107 FIDELITY 500 INDEX FUND	<u>\$ 108,774</u>	<u>2018-11-08</u>
<u>2</u>	2047 FIDELITY 500 INDEX PREMIUM	<u>\$ 200,913</u>	<u>2018-07-23</u>
<u>3</u>	116 159 FIDELITY 500 INDEX PREMIUM	<u>\$ 10,946</u>	<u>2018-01-02</u>
<u>4</u>	124 CSL LTD	<u>\$ 9,345</u>	<u>2018-07-24</u>
<u>5</u>	33 APPLE INC	<u>\$ 6,323</u>	<u>2018-07-02</u>
<u>6</u>	28 ADOBE SYSTEMS	<u>\$ 7,265</u>	<u>2018-07-23</u>
<u>7</u>	317 TAL EDUC GROUP ADS REP COM SHS	<u>\$ 12,604</u>	<u>2018-07-23</u>
<u>8</u>	188 MONOTARO CO LTD ADR	<u>\$ 9,095</u>	<u>2018-07-23</u>
<u>9</u>	95 ZOETIS INC CLASS-A	<u>\$ 7,976</u>	<u>2018-07-23</u>
<u>10</u>	50 MOODYS CORP	<u>\$ 9,306</u>	<u>2018-07-23</u>

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>11</u>	80 SALESFORCE COM,INC	<u>\$ 11,805</u>	<u>2018-07-23</u>
<u>12</u>	144 DASSAULT SYSTEMS SA ADS	<u>\$ 21,528</u>	<u>2018-07-23</u>
<u>13</u>	251 APPLIED MATERIALS INC	<u>\$ 13,353</u>	<u>2018-01-11</u>
<u>14</u>	9 APPLE INC	<u>\$ 1,578</u>	<u>2018-01-11</u>
<u>15</u>	80 ALIBABA GROUP HLDG LTD	<u>\$ 15,100</u>	<u>2018-01-11</u>
<u>16</u>	845 TENCENT HLDGS LTD UNSPON ADR	<u>\$ 46,771</u>	<u>2018-01-11</u>
<u>17</u>	40 NVIDIA CORPORATION	<u>\$ 8,963</u>	<u>2018-01-11</u>
<u>18</u>	26 AMAZON COM INC	<u>\$ 33,194</u>	<u>2018-01-11</u>
<u>19</u>	50 SERVICENOW INC	<u>\$ 6,879</u>	<u>2018-01-11</u>
<u>20</u>	126 PAYPAL HLDGS INC COM	<u>\$ 10,049</u>	<u>2018-01-11</u>

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>21</u>	131 000 UNITEDHEALTH GP INC	<u>\$ 29,526</u>	<u>2018-01-11</u>
<u>22</u>	405 000 BANK OF AMERICA CORP	<u>\$ 12,417</u>	<u>2018-01-11</u>
<u>23</u>	19 000 COSTAR GROUP INC	<u>\$ 6,029</u>	<u>2018-01-11</u>