

EXTENDED TO NOVEMBER 15, 2019
Return of Private Foundation

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

OMB No 1545-0052
2018
Open to Public Inspection

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

For calendar year 2018 or tax year beginning , and ending

Name of foundation
**THE COUCH FAMILY FOUNDATION
C/O MOTT PHILANTHROPIC**

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

Room/suite
1560

City or town, state or province, country, and ZIP or foreign postal code
BOSTON, MA 02199

A Employer identification number
10-0000573

B Telephone number
603-643-3441

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

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 **04**
 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)
\$ 58,716,488.

J Accounting method. Cash Accrual
 Other (specify) _____

Part I Analysis of Revenue and Expenses <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))</small>		(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	6,275,544.		N/A	
	2 Check <input type="checkbox"/> If the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	778,268.	778,268.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	3,135,321.			STATEMENT 1
	b Gross sales price for all assets on line 6a	19,660,784.			
	7 Capital gain net income (from Part IV, line 2)		8,729,125.		
	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	9,042.	9,042.		STATEMENT 3	
12 Total. Add lines 1 through 11	10,198,175.	9,516,435.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	30,000.	0.		
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees	STMT 4 6,950.	0.		
	c Other professional fees	STMT 5 459,576.	459,576.		
	17 Interest	44.	44.		
	18 Taxes	STMT 6 49,764.	46,166.		3,598.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses	STMT 7 220,952.	0.		200,355.
	24 Total operating and administrative expenses. Add lines 13 through 23	767,286.	505,786.		233,953.
	25 Contributions, gifts, grants paid	2,055,270.			2,055,270.
26 Total expenses and disbursements. Add lines 24 and 25	2,822,556.	505,786.		2,289,223.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	7,375,619.				
b Net investment income (if negative, enter -0-)		9,010,649.			
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	334,933.	918,996.	918,996.
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 9	31,691,037.	37,392,590.	49,399,692.
	c Investments - corporate bonds STMT 10	6,845,675.	7,871,390.	8,397,800.
	11 Investments land, buildings, and equipment basis ▶			
Less accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other	1,923,361.	0.	0.	
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)	40,795,006.	46,182,976.	58,716,488.	
Liabilities	17 Accounts payable and accrued expenses		7,618.	
	18 Grants payable			
	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.	7,618.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	24 Unrestricted and complete lines 24 through 26, and lines 30 and 31.			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>			
	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	-40,795,006.	46,175,358.		
30 Total net assets or fund balances	40,795,006.	46,175,358.		
31 Total liabilities and net assets/fund balances	40,795,006.	46,182,976.		

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	40,795,006.
2 Enter amount from Part I, line 27a	2	7,375,619.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	48,170,625.
5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 8	5	1,995,267.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	46,175,358.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a				
b SEE ATTACHED STATEMENTS				
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				
b				
c				
d				
e 19,660,784.		10,931,659.	8,729,125.	
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) 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				
b				
c				
d				
e			8,729,125.	
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 8,729,125.
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?
If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part.

Yes No

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	3,108,235.	55,637,974.	.055865
2016	1,877,472.	47,480,299.	.039542
2015	1,056,813.	43,843,541.	.024104
2014	636,873.	38,651,256.	.016477
2013	248,870.	9,799,330.	.025397
2 Total of line 1, column (d)			2 .161385
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 .032277
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5			4 59,370,205.
5 Multiply line 4 by line 3			5 1,916,292.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 90,106.
7 Add lines 5 and 6			7 2,006,398.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.			8 2,289,223.

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	BBH WEALTH STRATEGIES, LLC - REMS GROUP SERIES	P		
b	BBH WEALTH STRATEGIES, LLC - REMS GROUP SERIES	P		
c	BBH WEALTH STRATEGIES, LLC - ALTAROCK PARTNERS SE	P		
d	BBH WEALTH STRATEGIES, LLC - ALTAROCK PARTNERS SE	P		
e	BBH WEALTH STRATEGIES, LLC - BURGUNDY EMERGING MA	P		
f	BBH WEALTH STRATEGIES, LLC - BURGUNDY EMERGING MA	P		
g	BBH WEALTH STRATEGIES, LLC - BURGUNDY EMERGING MA	P		
h	BBH WEALTH STRATEGIES, LLC - SELECT EQUITY SERIES	P		
i	BBH WEALTH STRATEGIES, LLC - SELECT EQUITY SERIES	P		
j	1818 PARTNERS, LP	P		
k	1818 PARTNERS, LP	P		
l	BROWN BROTHERS 0719	P		
m	BROWN BROTHERS 0719	P		
n	BBH WEALTH STRATEGIES, LLC - GQG PARTNERS EMERGIN	P		
o	DISPOSITION OF BBH WEALTH STRATEGIES, LLC - REMS	P		

	(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	-40,345.			-40,345.
b	-44,723.			-44,723.
c	-19,224.			-19,224.
d	107,867.			107,867.
e	2,413.			2,413.
f	47,832.			47,832.
g	161,329.			161,329.
h	-41,272.			-41,272.
i	732,875.			732,875.
j	9,900.			9,900.
k	258,289.			258,289.
l	2,305,590.		2,441,550.	-135,960.
m	14,198,039.		6,567,538.	7,630,501.
n	-378.			-378.
o	1,917,224.		1,922,571.	-5,347.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			-40,345.
b			-44,723.
c			-19,224.
d			107,867.
e			2,413.
f			47,832.
g			161,329.
h			-41,272.
i			732,875.
j			9,900.
k			258,289.
l			-135,960.
m			7,630,501.
n			-378.
o			-5,347.

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

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):
If gain, also enter in Part I, line 8, column (c).
If (loss), enter "-0-" in Part I, line 8

3

Part IV: Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.	(b) How acquired	(c) Date acquired	(d) Date sold
		P - Purchase D - Donation	(mo., day, yr.)	(mo., day, yr.)
1a	CAPITAL GAINS DIVIDENDS			
b				
c				
d				
e				
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

	(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	65,368.			65,368.
b				
c				
d				
e				
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) 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	Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			65,368.
b			
c			
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

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	8,729,125.
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

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Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	90,106.
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	90,106.
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	90,106.
6	Credits/Payments:		
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	147,554.
b	Exempt foreign organizations - tax withheld at source	6b	0.
c	Tax paid with application for extension of time to file (Form 8868)	6c	0.
d	Backup withholding erroneously withheld	6d	0.
7	Total credits and payments. Add lines 6a through 6d	7	147,554.
8	Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	0.
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	57,448.
11	Enter the amount of line 10 to be: Credited to 2019 estimated tax <input checked="" type="checkbox"/> 57,448. Refunded <input checked="" type="checkbox"/>	11	0.

Part VII-A Statements Regarding Activities

	Yes	No
1a		X
1b		X
1c		X
2		X
3		X
4a		X
4b		
5		X
6	X	
7	X	
8a		
8b		X
9		X
10	X	

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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 ▶ ANDERSEN TAX, LLC Telephone no. ▶ (617) 292-8400 Located at ▶ 125 HIGH STREET, 16TH FLOOR, BOSTON, MA ZIP+4 ▶ 02110		
15. Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 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 ▶		X

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

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

	Yes	No
1a. During the year, did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b. If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions. Organizations relying on a current notice regarding disaster assistance, check here ▶ N/A		
c. Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018?		X
2. Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)): a. At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ _____, _____, _____ b. Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A		
c. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶ _____, _____, _____		
3a. Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No b. If "Yes," did it have excess business holdings in 2018 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2018.) N/A		
4a. Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
b. Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?		X

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

	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))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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	
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	
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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		X
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A	
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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
RICHARD W. COUCH 23 BERRILL FARMS LANE HANOVER, NH 03755	TRUSTEE 1.00	0.	0.	0.
BARBARA J. COUCH 23 BERRILL FARMS LANE HANOVER, NH 03755	TRUSTEE 1.00	0.	0.	0.
BROOKE FREELAND 2716 HARRIS BLVD AUSTIN, TX 78703	MANAGER 15.00	30,000.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000 0

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
		0

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

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	

Total. Add lines 1 through 3 ▶ 0.

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	58,965,749.
b	Average of monthly cash balances	1b	1,308,571.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	60,274,320.
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	60,274,320.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	904,115.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	59,370,205.
6	Minimum investment return. Enter 5% of line 5	6	2,968,510.

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	2,968,510.
2a	Tax on investment income for 2018 from Part VI, line 5	2a	90,106.
b	Income tax for 2018. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	90,106.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	2,878,404.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	2,878,404.
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	2,878,404.

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	2,289,223.
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	2,289,223.
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	90,106.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	2,199,117.

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

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				2,878,404.
2 Undistributed Income, if any, as of the end of 2018				
a Enter amount for 2017 only			1,596,650.	
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				
e From 2017				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2018 from Part XII, line 4: ▶ \$ 2,289,223.				
a Applied to 2017, but not more than line 2a			1,596,650.	
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				692,573.
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))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2017. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019				2,185,831.
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	0.			
10 Analysis of line 9.				
a Excess from 2014				
b Excess from 2015				
c Excess from 2016				
d Excess from 2017				
e Excess from 2018				

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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. 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 STATEMENT 12

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:

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

c Any submission deadlines:

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

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Part XV Supplementary Information (continued)

3. Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ALBERT SCHWEITZER FELLOWSHIP 330 BROOKLINE AVE BOSTON, MA 02215		PUBLIC	GENERAL SUPPORT	10,000.
ALOHA FOUNDATION, INC - HULBERT OUTDOOR CENTER/ INSPIRINGKIDS 2968 LAKE MOREY RD FAIRLEE, VT 05045		PUBLIC	GENERAL SUPPORT	5,000.
AMERICAN PRECISION MUSEUM 196 MAIN ST, PO BOX 679 WINDSOR, VT 05089		PUBLIC	GENERAL SUPPORT	10,000.
AVA GALLERY AND ART CENTER 11 BANK STREET LEBANON, NH 03766		PUBLIC	GENERAL SUPPORT	10,000.
AVA GALLERY AND ART CENTER 11 BANK STREET LEBANON, NH 03766		PUBLIC	GENERAL SUPPORT	5,000.
Total	SEE CONTINUATION SHEET(S)			2,055,270.
b Approved for future payment				
NONE				
Total				0.

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
BEST BUDDIES NEW HAMPSHIRE 64 N MAIN ST #5 CONCORD, NH 03301		PUBLIC	GENERAL SUPPORT	5,000.
BIG BROTHER BIG SISTER OF CAPE COD & THE ISLANDS 1934 FALMOUTH ROAD CENTERVILLE, MA 02632		PUBLIC	GENERAL SUPPORT	10,000.
BRADLEY UNIVERSITY 1501 W. BRADLEY AVE. PEORIA, IL 61625		PUBLIC	GENERAL SUPPORT	10,000.
CAMP JABBERWOCKY- MARTHAS VINEYARD CEREBRAL PALSY CAMP 200 GREENWOOD AVE VINEYARD HAVEN, MA 02568		PUBLIC	GENERAL SUPPORT	5,000.
CENTER FOR SCHOOL SUCCESS 79 EAST WILDER ROAD WEST LEBANON, NH 03784		PUBLIC	GENERAL SUPPORT	5,000.
CHANGING PERSPECTIVES P.O. BOX 694 BRADFORD, VT 05033		PUBLIC	GENERAL SUPPORT	7,500.
CHILD AND FAMILY SERVICES OF NEW HAMPSHIRE 464 CHESTNUT STREET MANCHESTER, NH 03105		PUBLIC	GENERAL SUPPORT	20,000.
CHILDREN'S CENTER OF THE UPPER VALLEY 178 MECHANIC ST LEBANON, NH 03766		PUBLIC	GENERAL SUPPORT	20,000.
CHILDREN'S LITERACY FOUNDATION 1536 LOOMIS HILL ROAD WATERBURY CENTER, VT 05677		PUBLIC	GENERAL SUPPORT	25,000.
CIRCLE PROGRAM 85 MAIN ST #5 PLYMOUTH, NH 03264		PUBLIC	GENERAL SUPPORT	5,000.
Total from continuation sheets				2,015,270.

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
CITY YEAR NEW HAMPSHIRE 848 ELM STREET MANCHESTER, NH 03101		PUBLIC	GENERAL SUPPORT	5,000.
CLAREMONT LEARNING PARTNERSHIP/ ONE 4 ALL FAMILY SPACE 169 MAIN ST. CLAREMONT, NH 03743		PUBLIC	GENERAL SUPPORT	65,000.
COLGATE UNIVERSITY 13 OAK DRIVE HAMILTON, NY 13346		PUBLIC	GENERAL SUPPORT	10,000.
COURT APPOINTED ADVOCATES (CASA) OF NEW HAMPSHIRE P.O. BOX 1327 MANCHESTER, NH 03105		PUBLIC	GENERAL SUPPORT	10,000.
COVER HOME REPAIR, INC. 158 SOUTH MAIN STREET WHITE RIVER JUNCTION, VT 05001		PUBLIC	GENERAL SUPPORT	10,000.
DARTMOUTH COLLEGE 6066 DEVELOPMENT OFFICE HANOVER, NH 03755		PUBLIC	GENERAL SUPPORT	15,000.
DARTMOUTH COLLEGE: THAYER SCHOOL OF ENGINEERING AT DARTMOUTH 14 ENGINEERING DR HANOVER, NH 03755		PUBLIC	GENERAL SUPPORT	25,000.
DARTMOUTH-HITCHCOCK MEMORIAL HOSPITAL ONE MEDICAL CENTER DRIVE LEBANON, NH 03756		PUBLIC	GENERAL SUPPORT	2,500.
DARTMOUTH-HITCHCOCK MEMORIAL HOSPITAL ONE MEDICAL CENTER DRIVE LEBANON, NH 03756		PUBLIC	GENERAL SUPPORT	1,000.
DARTMOUTH-HITCHCOCK: CHAD ONE MEDICAL CENTER DRIVE LEBANON, NH 03756		PUBLIC	GENERAL SUPPORT	30,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
DARTMOUTH-HITCHCOCK: COMMUNITY HEALTH ONE MEDICAL CENTER DRIVE LEBANON, NH 03756		PUBLIC	GENERAL SUPPORT	120,000.
DARTMOUTH-HITCHCOCK: FRIENDS OF THE NORRIS COTTON CANCER CENTER ONE MEDICAL CENTER DRIVE LEBANON, NH 03756		PUBLIC	GENERAL SUPPORT	10,000.
DISMAS OF VERMONT, INC. 103 PARK AVENUE RUTLAND, VT 05701		PUBLIC	GENERAL SUPPORT	10,000.
FAIRLEE COMMUNITY ARTS, INC. (FCA 55 TOWN COMMON RD FAIRLEE, VT 05045		PUBLIC	GENERAL SUPPORT	5,000.
FRIENDS OF NEW HAMPSHIRE DRUG COURTS PO BOX 326 NORTH HAVERHILL, NH 03774		PUBLIC	GENERAL SUPPORT	5,000.
FRIENDS OF THE CHILMARK PUBLIC LIBRARY PO BOX 434 CHILMARK, MA 02535		PUBLIC	GENERAL SUPPORT	2,000.
FRIENDS OF WLRN 172 NE 15TH STREET MIAMI, FL 33132		PUBLIC	GENERAL SUPPORT	1,000.
FUTURE IN SIGHT 25 WALKER ST CONCORD, NH 03301		PUBLIC	GENERAL SUPPORT	10,000.
GEISEL SCHOOL OF MEDICINE AT DARTMOUTH ONE MEDICAL CENTER DRIVE LEBANON, NH 03756		PUBLIC	GENERAL SUPPORT	10,000.
GIFT OF ADOPTION NEW HAMPSHIRE CHAPTER 2001 WAUKEGAN ROAD TECHNY, IL 60082		PUBLIC	GENERAL SUPPORT	1,000.
Total from continuation sheets				

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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
GIRLS ON THE RUN VERMONT 801 EAST MOREHEAD STREET CHARLOTTE , NC 28202		PUBLIC	GENERAL SUPPORT	4,500.
GLOBAL CAMPUSES FOUNDATION 43 S MAIN STREET RANDOLPH, VT 05060		PUBLIC	GENERAL SUPPORT	5,000.
GOOD BEGINNINGS OF THE UPPER VALLEY PO BOX 5054 WEST LEBANON, NH 03784		PUBLIC	GENERAL SUPPORT	1,000.
GOOD BEGINNINGS OF THE UPPER VALLEY PO BOX 5054 WEST LEBANON, NH 03784		PUBLIC	GENERAL SUPPORT	6,000.
GOOD NEIGHBOR HEALTH CLINICS 70 NORTH MAIN STREET WHITE RIVER JUNCTION, VT 05001		PUBLIC	GENERAL SUPPORT	10,000.
GRAFTON COUNTY SENIOR CITIZENS COUNCIL, INC. 10 CAMBELL STREET LEBANON, NH 03766		PUBLIC	GENERAL SUPPORT	17,000.
GREEN MOUNTAIN CHILDREN'S CENTER 92 FARMVU DR WHITE RIVER JUNCTION, VT 05001		PUBLIC	GENERAL SUPPORT	10,000.
GREEN MOUNTAIN CHILDREN'S CENTER 92 FARMVU DR WHITE RIVER JUNCTION, VT 05001		PUBLIC	GENERAL SUPPORT	10,000.
GREEN MOUNTAIN CHILDREN'S CENTER 92 FARMVU DR WHITE RIVER JUNCTION, VT 05001		PUBLIC	GENERAL SUPPORT	14,950.
HAMPSHIRE COOPERATIVE NURSERY SCHOOL 104 LYME RD. HANOVER, NH 03755		PUBLIC	GENERAL SUPPORT	5,000.
Total from continuation sheets				

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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
HANOVER AREA CHAMBER OF COMMERCE 146 CARLISLE STREET HANOVER, PA 17331		PUBLIC	GENERAL SUPPORT	4,000.
HANOVER NH ROTARY CHARITIES PO BOX 381 HANOVER, NH 03755		PUBLIC	GENERAL SUPPORT	5,000.
HARLEM RBI DBA DREAM 1991 SECOND AVENUE NEW YORK, NY 10029		PUBLIC	GENERAL SUPPORT	2,000.
HEADREST 14 CHURCH STREET LEBANON, NH 03766		PUBLIC	GENERAL SUPPORT	15,000.
HIGH HORSES 138 HORSE FARM ROAD SHARON, VT 05065		PUBLIC	GENERAL SUPPORT	10,000.
HOPE ON HAVEN HILL 326 ROCHESTER HILL RD ROCHESTER, NH 03867		PUBLIC	GENERAL SUPPORT	10,000.
ISLAND GROWN INITIATIVE PO BOX 622 VINEYARD HAVEN, MA 02569		PUBLIC	GENERAL SUPPORT	10,000.
LEAGUE OF NH ARTS AND CRAFTS, HANOVER BRANCH, INC 13 LEBANON STREET HANOVER, NH 03755		PUBLIC	GENERAL SUPPORT	2,500.
LEBANON OPERA HOUSE 51 N PARK ST LEBANON, NH 03766		PUBLIC	GENERAL SUPPORT	10,000.
MAPLE LEAF CHILDREN'S CENTER 2596 VT-113 THETFORD, VT 05074		PUBLIC	GENERAL SUPPORT	10,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
MARTHA'S VINEYARD BOYS & GIRLS CLUB PO BOX 654 EDGARTOWN, MA 02539		PUBLIC	GENERAL SUPPORT	5,000.
MARTHA'S VINEYARD HOSPITAL, INC. 1 HOSPITAL RD OAK BLUFFS, MA 02557		PUBLIC	GENERAL SUPPORT	10,000.
MARTHA'S VINEYARD MUSEUM 59 SCHOOL ST EDGARTOWN, MA 02539		PUBLIC	GENERAL SUPPORT	250,000.
MASSACHUSETTS AUDUBON SOCIETY 346 GRAPEVINE RD WENHAM, MA 01984		PUBLIC	GENERAL SUPPORT	3,500.
MAYHEW PROGRAM 293 W SHORE ROAD BRISTOL, NH 03222		PUBLIC	GENERAL SUPPORT	5,000.
MONTSHIRE MUSEUM OF SCIENCE ONE MONTSHIRE ROAD NORWICH, VT 05055		PUBLIC	GENERAL SUPPORT	5,000.
MONTSHIRE MUSEUM OF SCIENCE ONE MONTSHIRE ROAD NORWICH, VT 05055		PUBLIC	GENERAL SUPPORT	12,000.
MT ASCUTNEY OUTDOORS, INC PO BOX 101 BROWNSVILLE, VT 05037		PUBLIC	GENERAL SUPPORT	10,000.
MVYOUTH PO BOX 654 EDGARTOWN, MA 02539		PUBLIC	GENERAL SUPPORT	1,697.
NEW HAMPSHIRE ACADEMY OF SCIENCE 95 DARTMOUTH COLLEGE HWY LYME, NH 03768		PUBLIC	GENERAL SUPPORT	66,400.
Total from continuation sheets				

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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
NEW HAMPSHIRE ALCOHOL AND DRUG ABUSE COUNSELORS ASSOCIATION 130 PEMBROKE RD #100 CONCORD, NH 03301		PUBLIC	GENERAL SUPPORT	5,000.
NEW HAMPSHIRE BUSINESS COMMITTEE FOR THE ARTS 49 SOUTH MAIN STREET, SUITE 205 CONCORD, NH 03301		PUBLIC	GENERAL SUPPORT	1,000.
NEW HAMPSHIRE BUSINESS COMMITTEE FOR THE ARTS 49 SOUTH MAIN STREET, SUITE 205 CONCORD, NH 03301		PUBLIC	GENERAL SUPPORT	1,000.
NEW HAMPSHIRE CENTER FOR NONPROFITS 84 SILK FARM ROAD CONCORD, NH 03301		PUBLIC	GENERAL SUPPORT	5,000.
NEW HAMPSHIRE CHARITABLE FOUNDATION 37 PLEASANT STREET CONCORD, NH 03301		PUBLIC	GENERAL SUPPORT	50,000.
NEW HAMPSHIRE CHARITABLE FOUNDATION 37 PLEASANT STREET CONCORD, NH 03301		PUBLIC	GENERAL SUPPORT	152,703.
NEW HAMPSHIRE CHARITABLE FOUNDATION 37 PLEASANT STREET CONCORD, NH 03301		PUBLIC	GENERAL SUPPORT	10,000.
NEW HAMPSHIRE CHILDREN'S TRUST 10 FERRY ST # 315 CONCORD, NH 03301		PUBLIC	GENERAL SUPPORT	5,000.
NEW HAMPSHIRE COLLEGE AND UNIVERSITY COUNCIL 3 BARRELL COURT, SUITE 100 CONCORD, NH 03301		PUBLIC	GENERAL SUPPORT	1,500.
NEW HAMPSHIRE HUMANITIES 117 PLEASANT STREET CONCORD, NH 03301		PUBLIC	GENERAL SUPPORT	7,500.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
NEW HAMPSHIRE LEGAL ASSISTANCE 117 NORTH STATE STREET CONCORD, NH 03301		PUBLIC	GENERAL SUPPORT	1,000.
NEW HAMPSHIRE PUBLIC RADIO 2 PILSBURY STREET CONCORD, NH 03301		PUBLIC	GENERAL SUPPORT	1,000.
NEW HAMPSHIRE WOMEN'S FOUNDATION 2 DELTA DRIVE CONCORD, NH 03301		PUBLIC	GENERAL SUPPORT	10,000.
NEW HEIGHTS YOUTH, INC. 50 E 118TH ST NEW YORK, NY 10035		PUBLIC	GENERAL SUPPORT	10,000.
NORTHERN STAGE PO BOX 4287 WHITE RIVER JUNCTION, VT 05001		PUBLIC	GENERAL SUPPORT	10,000.
OPERA NORTH 20 WEST PARK STREET LEBANON, NH 03766		PUBLIC	GENERAL SUPPORT	5,000.
ORANGE COUNTY PARENT CHILD CENTER 693 VT-110 TUNBRIDGE, VT 05077		PUBLIC	GENERAL SUPPORT	20,000.
PANMASS CHALLENGE 77 4TH AVE NEEDHAM, MA 02494		PUBLIC	GENERAL SUPPORT	1,000.
PLANNED PARENTHOOD OF NORTHERN NEW ENGLAND 784 HERCULES DRIVE, SUITE 110 COLCHESTER, VT 05446		PUBLIC	GENERAL SUPPORT	25,000.
PLANNED PARENTHOOD OF NORTHERN NEW ENGLAND 784 HERCULES DRIVE, SUITE 110 COLCHESTER, VT 05446		PUBLIC	GENERAL SUPPORT	25,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
POSITIVE TRACKS 35 SOUTH MAIN STREET HANOVER, NH 03755		PUBLIC	GENERAL SUPPORT	15,000.
PUBLIC HEALTH COUNCIL OF THE UPPER VALLEY ONE COURT STREET #378 LEBANON, NH 03766		PUBLIC	GENERAL SUPPORT	5,000.
RAISING A READER MA 9B HAMILTON PLACE, 3RD FL BOSTON, MA 02108		PUBLIC	GENERAL SUPPORT	7,500.
REVELS NORTH PO BOX 415 HANOVER, NH 03755		PUBLIC	GENERAL SUPPORT	2,500.
ROOM TO GROW 142 BERKLEY STREET BOSTON, MA 02116		PUBLIC	GENERAL SUPPORT	10,000.
ROOM TO GROW 142 BERKLEY STREET BOSTON, MA 02116		PUBLIC	GENERAL SUPPORT	5,000.
SAFEART 19-40 HAZEN ST EAST ELMHURST, NY 11370		PUBLIC	GENERAL SUPPORT	5,520.
SAFELINE, INC. PO BOX 368 CHELSEA, VT 05038		PUBLIC	GENERAL SUPPORT	6,000.
SAIL MARTHA'S VINEYARD 79 BEACH RD VINEYARD HAVEN, MA 02568		PUBLIC	GENERAL SUPPORT	7,500.
SECOND GROWTH, INC. PO BOX 5227 WEST LEBANON, NH 03784		PUBLIC	GENERAL SUPPORT	10,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
SOCIETY FOR THE PROTECTION OF NEW HAMPSHIRE FORESTS 54 PORTSMOUTH STREET CONCORD, NH 03301		PUBLIC	GENERAL SUPPORT	2,500.
SOUTHEASTERN VERMONT COMMUNITY ACTION 91 BUCK DR WESTMINSTER, VT 05158		PUBLIC	GENERAL SUPPORT	7,500.
SPARK! COMMUNITY CENTER 75 BANK ST LEBANON, NH 03766		PUBLIC	GENERAL SUPPORT	5,000.
SPECIAL NEEDS SUPPORT CENTER 12 FLYNN STREET LEBANON, NH 03766		PUBLIC	GENERAL SUPPORT	5,000.
TEXAS CIVIL RIGHTS PROJECT 1405 MONTOPOLIS DR AUSTIN, TX 78741		PUBLIC	GENERAL SUPPORT	2,500.
THE CIRCUS BARN, INC. 1 CIRCUS ROAD GREENSBORO, VT 05841		PUBLIC	GENERAL SUPPORT	5,000.
THE FAMILY PLACE 319 US ROUTE 5 SOUTH NORWICH, VT 05055		PUBLIC	GENERAL SUPPORT	20,000.
THE GOVERNOR'S INSTITUTES OF VERMONT 20 W CANAL ST C5 WINOOSKI, VT 05404		PUBLIC	GENERAL SUPPORT	4,000.
THE SCOTLAND HOUSE 430 W DUKE OF GLOUCESTER ST WILLIAMSBURG, VA 23185		PUBLIC	GENERAL SUPPORT	5,000.
THE SPACE ON MAIN, INC. 174 MAIN STREET BRADFORD, VT 05033		PUBLIC	GENERAL SUPPORT	5,000.
Total from continuation sheets				

THE COUCH FAMILY FOUNDATION
C/O MOTT PHILANTHROPIC

10-0000573

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 YARD PO BOX 405 CHILMARK, MA 02535		PUBLIC	GENERAL SUPPORT	250,000.
TLC FAMILY RESOURCE CENTER 109 PLEASANT ST CLAREMONT, NH 03743		PUBLIC	GENERAL SUPPORT	20,000.
TOWN OF HANOVER SUSTAINABLE HANOVER COMMITTEE PO BOX 483 HANOVER, NH 03755		PUBLIC	GENERAL SUPPORT	5,000.
TRUSTEES OF COLUMBIA UNIVERSITY IN THE CITY OF NEW YORK 535 W 116TH ST NEW YORK, NY 10027		PUBLIC	GENERAL SUPPORT	500.
TWIN PINES HOUSING TRUST - VT 240 SOUTH MAIN STREET WHITE RIVER JUNCTION, VT 05001		PUBLIC	GENERAL SUPPORT	25,000.
TWIN PINES HOUSING TRUST - VT 240 SOUTH MAIN STREET WHITE RIVER JUNCTION, VT 05001		PUBLIC	GENERAL SUPPORT	10,000.
UNITED VALLEY INTERFAITH PROJECT, INC. PO BOX 187 MERIDEN, NH 03770		PUBLIC	GENERAL SUPPORT	5,000.
UNIVERSITY OF TEXAS- LITERACY FIRST 200 W. 24TH STREET AUSTIN, TX 78705		PUBLIC	GENERAL SUPPORT	5,000.
UNIVERSITY OF TEXAS, PRISCILLA POND FLAWN CHILD AND FAMILY LABORATORY 200 W. 24TH STREET AUSTIN, TX 78705		PUBLIC	GENERAL SUPPORT	5,000.
UPPER VALLEY AQUATICS CENTER 100 ARBORETUM LN WHITE RIVER JUNCTION, VT 05001		PUBLIC	GENERAL SUPPORT	5,000.
Total from continuation sheets				

THE COUCH FAMILY FOUNDATION
C/O MOTT PHILANTHROPIC

10-0000573

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
UPPER VALLEY AQUATICS CENTER 100 ARBORETUM LN WHITE RIVER JUNCTION, VT 05001		PUBLIC	GENERAL SUPPORT	10,000.
UPPER VALLEY HAVEN 713 HARTFORD AVENUE WHITE RIVER JUNCTION, VT 05001		PUBLIC	GENERAL SUPPORT	5,000.
UPPER VALLEY HAVEN 713 HARTFORD AVENUE WHITE RIVER JUNCTION, VT 05001		PUBLIC	GENERAL SUPPORT	35,000.
UPPER VALLEY HUMANE SOCIETY 300 OLD ROUTE 10 ENFIELD, NH 03748		PUBLIC	GENERAL SUPPORT	2,500.
UPPER VALLEY LAND TRUST 19 BUCK ROAD HANOVER, NH 03755		PUBLIC	GENERAL SUPPORT	10,000.
UPPER VALLEY SNOW SPORTS FOUNDATION 160 WHALEBACK MOUNTAIN RD. ENFIELD, NH 03748		PUBLIC	GENERAL SUPPORT	25,000.
UPPER VALLEY TRAILS ALLIANCE PO BOX 1215 NORWICH, VT 05055		PUBLIC	GENERAL SUPPORT	5,000.
UPPER VALLEY WALDORF SCHOOL 80 BLUFF RD QUECHEE, VT 05059		PUBLIC	GENERAL SUPPORT	10,000.
VALLEY COURT DIVERSION PROGRAMS 211 NORTH MAIN STREET WHITE RIVER JUNCTION, VT 05001		PUBLIC	GENERAL SUPPORT	5,000.
VINEYARD COMMITTEE ON HUNGER/ ISLAND FOOD PANTRY PO BOX 4685 VINEYARD HAVEN, MA 02568		PUBLIC	GENERAL SUPPORT	2,000.
Total from continuation sheets				

THE COUCH FAMILY FOUNDATION
C/O MOTT PHILANTHROPIC

10-0000573

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
VINS, INC 6565 WOODSTOCK ROAD ROUTE 4, PO BOX 1281 QUECHEE, VT 05059		PUBLIC	GENERAL SUPPORT	25,000.
VISITING NURSE AND HOSPICE OF VERMONT & NEW HAMPSHIRE PO BOX 976 WHITE RIVER JUNCTION, VT 05001		PUBLIC	GENERAL SUPPORT	2,500.
VITAL COMMUNITIES 195 NORTH MAIN STREET WHITE RIVER JUNCTION, VT 05001		PUBLIC	GENERAL SUPPORT	10,000.
WEST CENTRAL BEHAVIORAL HEALTH 9 HANOVER STREET, SUITE 2 LEBANON, NH 03766		PUBLIC	GENERAL SUPPORT	20,000.
WEST CENTRAL BEHAVIORAL HEALTH 9 HANOVER STREET, SUITE 2 LEBANON, NH 03766		PUBLIC	GENERAL SUPPORT	10,000.
WGBH DBA WCAI 3 WATER STREET WOODS HOLE, MA 02543		PUBLIC	GENERAL SUPPORT	1,000.
WHITE RIVER PARTNERSHIP 4266 VT-14 SOUTH ROYALTON, VT 05068		PUBLIC	GENERAL SUPPORT	2,500.
WILLING HANDS ENTERPRISES PO BOX 172 LEBANON, NH 03766		PUBLIC	GENERAL SUPPORT	6,500.
WOODSTOCK COMMUNITY PLAYSCHOOL, INC. DBA RAINBOW PLAYSCHOOL 54 RIVER STREET WOODSTOCK, VT 05091		PUBLIC	GENERAL SUPPORT	20,000.
ZACK'S PLACE ENRICHMENT CENTER 73 CENTRAL STREET, SUITE A, PO BOX 634 WOODSTOCK, VT 05091		PUBLIC	GENERAL SUPPORT	5,000.
Total from continuation sheets				

THE COUCH FAMILY FOUNDATION
C/O MOTT PHILANTHROPIC

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue:					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities					778,268.
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					9,042.
8 Gain or (loss) from sales of assets other than inventory					3,135,321.
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a _____					
b _____					
c _____					
d _____					
e _____					
12 Subtotal. Add columns (b), (d), and (e)		0.		0.	3,922,631.
13 Total. Add line 12, columns (b), (d), and (e)				13	3,922,631.

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

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

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

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) (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		X
(2) Other assets		X
b Other transactions		
(1) Sales of assets to a noncharitable exempt organization		X
(2) Purchases of assets from a noncharitable exempt organization		X
(3) Rental of facilities, equipment, or other assets		X
(4) Reimbursement arrangements		X
(5) Loans or loan guarantees		X
(6) Performance of services or membership or fundraising solicitations		X
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees		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.		

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
		N/A	

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? Yes No

b If "Yes," complete the following schedule

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

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

Sign Here: 11/11/19 OFFICER

Signature of officer or trustee Date 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 <input type="checkbox"/> if self-employed	PTIN
	KELLIE NEUHAUS	<u>Kellie Neuhaus</u>	11/04/19		P00838213
	Firm's name ▶ ANDERSEN TAX, LLC	Firm's EIN ▶ 33-1197384			
Firm's address ▶ 125 HIGH STREET, 16TH FLOOR BOSTON, MA 02110				Phone no. (617) 292-8400	

Schedule B

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

- ▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Go to www.irs.gov/Form990 for the latest information.

OMB No 1545-0047

2018

Name of the organization

THE COUCH FAMILY FOUNDATION
C/O MOTT PHILANTHROPIC

Employer identification number

10-0000573

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 foundationCheck 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 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 33 1/3% 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 (entering "N/A" in column (b) instead of the contributor name and address), 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 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2018)

Name of organization THE COUCH FAMILY FOUNDATION C/O MOTT PHILANTHROPIC	Employer identification number 10-0000573
---------------------------------------------------------------------------------------------	----------------------------------------------

Part I **Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	RICHARD COUCH 23 BERRILL FARMS LANE HANOVER, NH 03755	\$ 6,275,544.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization THE COUCH FAMILY FOUNDATION C/O MOTT PHILANTHROPIC	Employer identification number 10-0000573
---------------------------------------------------------------------------------------------	----------------------------------------------

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
1	MARKETABLE SECURITIES	\$ 393,780.	01/02/18
1	MARKETABLE SECURITIES	\$ 149,388.	01/31/18
1	MARKETABLE SECURITIES	\$ 138,571.	03/07/18
1	MARKETABLE SECURITIES	\$ 988,827.	04/20/18
1	MARKETABLE SECURITIES	\$ 4,604,978.	08/29/18
		\$	

Name of organization
**THE COUCH FAMILY FOUNDATION
 C/O MOTT PHILANTHROPIC**

Employer identification number
10-0000573

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 info once) **\$** _____
 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
_____	_____
_____	_____
_____	_____

FORM 990-PF GAIN OR (LOSS) FROM SALE OF ASSETS STATEMENT 1

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) MANNER ACQUIRED DEPREC.	(F) DATE ACQUIRED GAIN OR LOSS	DATE SOLD
BBH WEALTH STRATEGIES, LLC - REMS GROUP SERIES	-40,345.	0.	0.	PURCHASED	0.	-40,345.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) MANNER ACQUIRED DEPREC.	(F) DATE ACQUIRED GAIN OR LOSS	DATE SOLD
BBH WEALTH STRATEGIES, LLC - REMS GROUP SERIES	-44,723.	0.	0.	PURCHASED	0.	-44,723.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) MANNER ACQUIRED DEPREC.	(F) DATE ACQUIRED GAIN OR LOSS	DATE SOLD
BBH WEALTH STRATEGIES, LLC - ALTAROCK PARTNERS SERIES	-19,224.	0.	0.	PURCHASED	0.	-19,224.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
BBH WEALTH STRATEGIES, LLC - ALTAROCK PARTNERS SERIES	PURCHASED		
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.
107,867.	0.	0.	(F) GAIN OR LOSS 107,867.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
BBH WEALTH STRATEGIES, LLC - BURGUNDY EMERGING MARKET SERIES	PURCHASED		
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.
2,413.	0.	0.	(F) GAIN OR LOSS 2,413.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
BBH WEALTH STRATEGIES, LLC - BURGUNDY EMERGING MARKET SERIES	PURCHASED		
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.
47,832.	0.	0.	(F) GAIN OR LOSS 47,832.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
BBH WEALTH STRATEGIES, LLC - BURGUNDY EMERGING MARKET SERIES	PURCHASED		
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.
161,329.	0.	0.	(F) GAIN OR LOSS 161,329.

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
BBH WEALTH STRATEGIES, LLC - SELECT EQUITY SERIES			PURCHASED		
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
-41,272.	0.	0.	0.	-41,272.	

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
BBH WEALTH STRATEGIES, LLC - SELECT EQUITY SERIES			PURCHASED		
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
732,875.	0.	0.	0.	732,875.	

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
1818 PARTNERS, LP			PURCHASED		
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
9,900.	0.	0.	0.	9,900.	

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
1818 PARTNERS, LP			PURCHASED		
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
258,289.	0.	0.	0.	258,289.	

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	MANNER ACQUIRED (E) DEPREC.	DATE ACQUIRED	DATE SOLD (F) GAIN OR LOSS
BROWN BROTHERS 0719				PURCHASED		
	2,305,590.	2,441,550.	0.		0.	-135,960.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	MANNER ACQUIRED (E) DEPREC.	DATE ACQUIRED	DATE SOLD (F) GAIN OR LOSS
BROWN BROTHERS 0719				PURCHASED		
	14,198,039.	12,161,342.	0.		0.	2,036,697.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	MANNER ACQUIRED (E) DEPREC.	DATE ACQUIRED	DATE SOLD (F) GAIN OR LOSS
BBH WEALTH STRATEGIES, LLC - GQG PARTNERS EMERGING MARKETS EQUITY SERIES				PURCHASED		
	-378.	0.	0.		0.	-378.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	MANNER ACQUIRED (E) DEPREC.	DATE ACQUIRED	DATE SOLD (F) GAIN OR LOSS
DISPOSITION OF BBH WEALTH STRATEGIES, LLC - REMS GROUP SERIES				PURCHASED		
	1,917,224.	1,922,571.	0.		0.	-5,347.

CAPITAL GAINS DIVIDENDS FROM PART IV						65,368.
TOTAL TO FORM 990-PF, PART I, LINE 6A						3,135,321.

FORM 990-PF

DIVIDENDS AND INTEREST FROM SECURITIES

STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
DIVIDENDS - 1818 PARTNERS	26,017.	0.	26,017.	26,017.	
DIVIDENDS - ALTAROCK	9,787.	0.	9,787.	9,787.	
DIVIDENDS - BROWN BROTHERS	345,441.	65,368.	280,073.	280,073.	
DIVIDENDS - BURGUNDY EMERGING MARKET	67,012.	0.	67,012.	67,012.	
DIVIDENDS - CEDARK ROCK	69,477.	0.	69,477.	69,477.	
DIVIDENDS - CLARKSTON CAPITAL PARTNERS	34,007.	0.	34,007.	34,007.	
DIVIDENDS - GQG PARTNERS	487.	0.	487.	487.	
DIVIDENDS - LBC CREDIT PARTNERS	14,958.	0.	14,958.	14,958.	
DIVIDENDS - REMS GROUP SERIES	32,159.	0.	32,159.	32,159.	
DIVIDENDS - SELECT EQUITY SERIES	128,901.	0.	128,901.	128,901.	
INTEREST - 1818 PARTNERS	9,273.	0.	9,273.	9,273.	
INTEREST - ALTAROCK	7,914.	0.	7,914.	7,914.	
INTEREST - BURGUNDY EMERGING MARKET	980.	0.	980.	980.	
INTEREST - CEDAR ROCK	667.	0.	667.	667.	
INTEREST - CLARKSTON CAPITAL PARTNERS	9,226.	0.	9,226.	9,226.	
INTEREST - CPIV ECX LLC	25.	0.	25.	25.	
INTEREST - GQG PARTNERS	76.	0.	76.	76.	
INTEREST - LBC CREDIT PARTNERS	72,444.	0.	72,444.	72,444.	
INTEREST - REMS GROUP SERIES	2,490.	0.	2,490.	2,490.	
INTEREST - SELECT EQUITY SERIES	12,295.	0.	12,295.	12,295.	
TO PART I, LINE 4	843,636.	65,368.	778,268.	778,268.	

FORM 990-PF

OTHER INCOME

STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
FROM K-1: BURGUNDY EMERGING MARKET SERIES	7,421.	7,421.	
FROM K-1: GQG PARTNERS EMERGING MARKETS EQUITY SERIES	639.	639.	
FROM K-1: SELECT EQUITY SERIES	257.	257.	
FROM K-1: 1818 PARTNERS	725.	725.	
TOTAL TO FORM 990-PF, PART I, LINE 11	9,042.	9,042.	

FORM 990-PF

ACCOUNTING FEES

STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	6,950.	0.		0.
TO FORM 990-PF, PG 1, LN 16B	6,950.	0.		0.

FORM 990-PF

OTHER PROFESSIONAL FEES

STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	456,552.	456,552.		0.
FROM K-1: BURGUNDY EMERGING MARKET	2,174.	2,174.		0.
FROM K-1: GQG PARTNERS EMERGING MARKETS EQUITY SERIES	850.	850.		0.
TO FORM 990-PF, PG 1, LN 16C	459,576.	459,576.		0.

FORM 990-PF TAXES STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	46,166.	46,166.		0.
PAYROLL TAXES	3,598.	0.		3,598.
TO FORM 990-PF, PG 1, LN 18	49,764.	46,166.		3,598.

FORM 990-PF OTHER EXPENSES STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OTHER GENERAL AND ADMIN COSTS	220,952.	0.		200,355.
TO FORM 990-PF, PG 1, LN 23	220,952.	0.		200,355.

FORM 990-PF OTHER DECREASES IN NET ASSETS OR FUND BALANCES STATEMENT 8

DESCRIPTION	AMOUNT
BBH ADJUSTMENT TO QRP COST BASIS IN STMTS	1,995,267.
TOTAL TO FORM 990-PF, PART III, LINE 5	1,995,267.

FORM 990-PF CORPORATE STOCK STATEMENT 9

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
EQUITIES	37,392,590.	49,399,692.
TOTAL TO FORM 990-PF, PART II, LINE 10B	37,392,590.	49,399,692.

FORM 990-PF CORPORATE BONDS STATEMENT 10

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
FIXED INCOME SECURITIES	7,871,390.	8,397,800.
TOTAL TO FORM 990-PF, PART II, LINE 10C	7,871,390.	8,397,800.

FORM 990-PF LIST OF SUBSTANTIAL CONTRIBUTORS STATEMENT 11
PART VII-A, LINE 10

NAME OF CONTRIBUTOR	ADDRESS
RICHARD W. COUCH	23 BERRILL FARMS LANE HANOVER, NH 03755
BARBARA J. COUCH	23 BERRILL FARMS LANE HANOVER, NH 03755

FORM 990-PF PART XV - LINE 1A STATEMENT 12
LIST OF FOUNDATION MANAGERS

NAME OF MANAGER
RICHARD W. COUCH
BARBARA J. COUCH