

Form **990-PF****Return of Private Foundation**
or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

2018

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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

For calendar year 2018 or tax year beginning

, 2018, and ending

, 20

Name of foundation

THOMAS ANTHONY PAPPAS CHARITABLE FOUNDATION, INC.

A Employer identification number

51-0153284

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

P.O. BOX 463

Room/suite

B Telephone number (see instructions)

781-862-2802

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

BELMONT, MA. 02478C If exemption application is pending, check here ☐G Check all that apply ☐ Initial return ☐ Initial return of a former public charity☐ Final return ☐ Amended return☐ Address change ☐ Name changeD 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 ☐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) ► \$ **8,491,624**J Accounting method ☒ Cash ☐ Accrual☐ Other (specify) _____

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

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	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	180165	180165	180165	
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	<251445>			
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)				
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	<71280>	180165	180165		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	377103	225788	225788	151315
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	39960	35964	35964	3996
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	27502	16469	16469	11033
	19 Depreciation (attach schedule) and depletion	2122	0	0	
	20 Occupancy	20676	10338	10338	10338
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	88108	55429	55429	32679
	24 Total operating and administrative expenses. Add lines 13 through 23	555471	343988	343988	209361
	25 Contributions, gifts, grants paid	208000			208000
26 Total expenses and disbursements. Add lines 24 and 25	763471	343988	343988	417361	
27 Subtract line 26 from line 12	<834751>				
a Excess of revenue over expenses and disbursements					
b Net investment income (if negative, enter -0-)		0			
c Adjusted net income (if negative, enter -0-)			0		

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form 990-PF (2018)

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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 (a) Book Value	End of year (b) Book Value (c) Fair Market Value	
Assets	1 Cash—non-interest-bearing	34,994	51,371	51,371
	2 Savings and temporary cash investments	1368,255	1,236,995	1,236,995
	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	33293	18790	18790
	10a Investments—U.S. and state government obligations (attach schedule)	0	0	0
	b Investments—corporate stock (attach schedule)	9,716,482	10,099,839	6,366,099
	c Investments—corporate bonds (attach schedule)	1,900,000	800,000	800,000
	11 Investments—land, buildings, and equipment basis ▶ Less: accumulated depreciation (attach schedule) ▶	7091	18369	18369
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)			
	14 Land, buildings, and equipment basis ▶ Less: accumulated depreciation (attach schedule) ▶			
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	13,060,115	12,225,364	8,491,624	
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)				
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> 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 ▶ <input type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	13,060,115	12,225,364	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see instructions)	13,060,115	12,225,364	
	31 Total liabilities and net assets/fund balances (see instructions)	13,060,115	12,225,364	

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 13,060,115
2 Enter amount from Part I, line 27a	2 < 834,751 >
3 Other increases not included in line 2 (itemize) ▶	3
4 Add lines 1, 2, and 3	4 12,225,364
5 Decreases not included in line 2 (itemize) ▶	5
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6 12,225,364

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 20,000 SHARES GOPRO	P	9.10.15	4.2.18
b 308 SHARES ROYLF	P	6.29.11	4.2.18
c INTEGRITY FUND	P	VARIOUS	12.31.18
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 88,830		534,579	<445,749>
b 275		186,505	<186,230>
c —		—	380,534
d			
e			

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

(f) FMV as of 12/31/69	(i) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (f), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			
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	<251,445>
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	0

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.) **NIA**

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

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

☐ Yes ☐ No

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

(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			
2016			
2015			
2014			
2013			

2 Total of line 1, column (d)	2	
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	
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	
5 Multiply line 4 by line 3	5	
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	
7 Add lines 5 and 6	7	
8 Enter qualifying distributions from Part XII, line 4	8	

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 <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 type="checkbox"/> and enter 1% of Part I, line 27b	1	0	
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	0	
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	0	
6	Credits/Payments.			
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	16718	
b	Exempt foreign organizations—tax withheld at source	6b		
c	Tax paid with application for extension of time to file (Form 8868)	6c		
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments. Add lines 6a through 6d	7	16718	
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	0	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	16718	
11	Enter the amount of line 10 to be Credited to 2019 estimated tax <u>16718</u> 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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year. (1) On the foundation. ▶ \$ <u>0</u> (2) On foundation managers. ▶ \$ <u>0</u>		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ <u>0</u>		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes.		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by <i>General Instruction T</i> .		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. ▶ <u>MASSACHUSETTS</u>		
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 <i>General Instruction G</i> ? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ►	X	
14 The books are in care of ► <u>THE FOUNDATION</u> Telephone no. ► <u>781-862-2802</u> Located at ► ZIP+4 ►		
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		
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 checked="" type="checkbox"/> Yes <input 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 ► <input type="checkbox"/>		X
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 ► 20 , 20 , 20 , 20		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)		X
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? <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

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

5a	During the year, did the foundation pay or incur any amount to:		Yes	No
(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		5b	N/A
	Organizations relying on a current notice regarding disaster assistance, check here	<input type="checkbox"/>		
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?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<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?		6b	X
	If "Yes" to 6b, file Form 8870.			
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?		7b	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. 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
JOHN PAPPAS, 5 MILITIA DRIVE, LEXINGTON, MA	Pres. TR., Director	38 161,823	NONE	NONE
SOPHIA SACHER, 5 MILITIA DRIVE, LEXINGTON, MA	V-P, CLERK, Director	21 47,640	NONE	NONE
Betsy DEMIRJIAN, 5 MILITIA DRIVE, LEXINGTON, MA	V-P, DIR.	32 47,640	NONE	NONE
THOMAS PAPPAS, Foretop RD., Bourne, MA	V-P, DIR.	22 120,000	NONE	NONE
DONALD D. YOUNG, 990 PARADISE BL., SWAMPSCOTT, MA	DIRECTOR	- 39,960	NONE	NONE

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 ▶

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	NONE	
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	NONE	
2		
3	All other program-related investments. See instructions.	

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	7,210,793
b	Average of monthly cash balances	1b	1,794,150
c	Fair market value of all other assets (see instructions)	1c	37,159
d	Total (add lines 1a, b, and c)	1d	9,042,102
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	9,042,102
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	135,707
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	8,906,395
6	Minimum investment return. Enter 5% of line 5	6	445,570

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	445,570
2a	Tax on investment income for 2018 from Part VI, line 5	2a	0
b	Income tax for 2018. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	0
3	Distributable amount before adjustments Subtract line 2c from line 1	3	445,570
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	445,570
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	445,570

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	417,361
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	0
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	0
b	Cash distribution test (attach the required schedule)	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	417,361
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	417,361

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				445,570
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2018:				
a From 2013				0
b From 2014				80,022
c From 2015				61,532
d From 2016				68,539
e From 2017				34,633
f Total of lines 3a through e				213,556
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ 417,361				
a Applied to 2017, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions)				
c Treated as distributions out of corpus (Election required—see instructions)				
d Applied to 2018 distributable amount				417,361
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a).)	28,209			28,209
6 Enter the net total of each column as indicated below:	185,347			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b				
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				
d Subtract line 6c from line 6b. Taxable amount—see instructions				
e Undistributed income for 2017. Subtract line 4a from line 2a. Taxable amount—see instructions				
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)				
8 Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions)	0			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	185,347			
10 Analysis of line 9				
a Excess from 2014	51,813			
b Excess from 2015	61,532			
c Excess from 2016	68,539			
d Excess from 2017	34,633			
e Excess from 2018	0			

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

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

Tax year	Prior 3 years			(e) Total
(a) 2018	(b) 2017	(c) 2016	(d) 2015	
b 85% of line 2a				
c Qualifying distributions from Part XII, line 4 for each year listed				
d Amounts included in line 2c not used directly for active conduct of exempt activities				
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c				
3 Complete 3a, b, or c for the alternative test relied upon				
a "Assets" alternative test—enter				
(1) Value of all assets				
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)				
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed				
c "Support" alternative test—enter				
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)				
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)				
(3) Largest amount of support from an exempt organization				
(4) Gross investment income				

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)

NONE

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions.

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

JOHN C. PAPPAS, P.O. BOX 463, BELMONT, MA, 02478-0004 781-862-2802

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

See Schedule

c Any submission deadlines

September 30

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

See Schedule

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					
See Schedule Attached		—	501(c)(3)	See Schedule	208,000
Total					3a 208,000
b Approved for future payment					
Total					3b

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
		(a) Business code	(b) Amount	(c) Exclusion 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			14	180165	
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					
8	Gain or (loss) from sales of assets other than inventory			18	251445	
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)				71280	
13	Total. Add line 12, columns (b), (d), and (e)				71280	

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

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

[illegible]

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

		Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (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.		

[illegible]


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

b If "Yes," complete the following schedule.		
(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Signature of officer or trustee: [Signature] Date: 11/12/19 Title: President

May the IRS discuss this return with the preparer shown below? See instructions ☒ Yes ☐ No

Paid Preparer Use Only	Print/Type preparer's name DONALD J. YOUNG	Preparer's signature <i>Donald J. Young</i> 	Date 11.6.19	Check <input checked="" type="checkbox"/> if self-employed	PTIN P01252332
	Firm's name ▶ DONALD J. YOUNG, C.P.A.			Firm's EIN ▶ 26-6240211	
	Firm's address ▶ 990 PARADISE ROAD, SWAMPSCOTT MA, 01907			Phone no 781-665-1166	

STAPLES

THOMAS ANTHONY PAPPAS CHARITABLE FOUNDATION, INC.

990-PF-2018-51-0153268-PART I-COL. d + PART XII

	Initials	Date
Prepared By		
Approved By		

BASIS FOR ALLOCATION OF ADMINISTRATIVE EXPENSES

Item	AMOUNT	DETAIL
COMPENSATION OF OFFICERS	13 151315	JOHN PAPPAS 50% CHARITABLE 50% INVESTMENT THOMAS PAPPAS 15% CHARITABLE 85% INVESTMENT BETSY DEMIRJAN 95% CHARITABLE 5% OFFICE SOPHIA SACKER 15% CHARITABLE 85% OFFICE
ACCOUNTING FEES	116 3996	10% CHARITABLE 90% ACCOUNTING
TAXES	18 11033	PAYROLL TAXES APPORTIONED AS PAYROLL
OCCUPANCY	20 10338	50% CHARITABLE 50% OFFICE
OTHER EXPENSES	23 32679	37.6% CHARITABLE 62.4% OFFICE
TOTAL	24 209361	

THE ABOVE ALLOCATIONS ARE BASED ON THE BEST
ESTIMATES OF TIME INVOLVED AND OCCUPANCY
UTILIZED BY THOSE DIRECTLY INVOLVED FOR
CHARITABLE AND INVESTMENT PURPOSES.

STAPLES

THOMAS ANTHONY PAPPAS CHARITABLE FOUNDATION, INC.

990-PF-2018-51-0153284

PART I. LINE 4

	Initials	Date
Prepared By		
Approved By		

PART I. LINE 4 - DIVIDENDS + INTEREST FROM SECURITIES

INTEREST INCOME

230064

DIVIDEND INCOME

48725

278789

Less- FOREIGN TAX WITHHELD

(5050)

Less- INTEGRITY BOSTON FUND

(93574)

PART I. LINE 4

180165

TAPCF Donations 2018		940 PF - 2018 51-0153284 TAPCF			
Name of Organization	Location	Amount	Purpose	Date	Chk # Bank
Health					
Boston Medical Center	Boston, MA	\$5,000	Substance abuse programs	12/7/2018	5408 CT
Brigham & Women's Hospital	Boston, MA	\$10,000	Reiki program for nurses	12/7/2018	5409 CT
Cape Cod Hospital	Hyannis, MA	\$15,000	Lamplighter Society	12/7/2018	5410 CT
Newton Wellesley Healthcare Fndn	Newton, MA	\$2,500	Annual	12/7/2018	5411 CT
Osteogenesis Imperfecta	Gaithersburg, MD	\$1,500	Strong Bones Gala	4/23/2018	5405 CT
Total Health		\$34,000			
Education					
Cuvilly Arts & Earth Center	Ipswich, MA	\$5,000	Yurt	12/7/2018	5412 CT
Perkins School for the Blind	Watertown, MA	\$4,000	Golf Tournament	6/25/2018	5407 CT
Total Education		\$9,000			
Arts					
Cahoon Museum	Cotuit, MA	\$2,500	Annual Fund	12/7/2018	5413 CT
Cape Symphony	Hyannis, MA	\$5,000	Youth People's Concert	12/7/2018	5414 CT
ICA	Boston, MA	\$5,000	Teen programs	12/7/2018	
Museum of Fine Arts	Boston, MA	\$4,500	Patrons	12/7/2018	5415 CT
Total Arts		\$17,000			
Social Welfare					
AMC	Boston, MA	\$5,000	Outdoors Rx	12/7/2018	5416 CT
Beverly Bootstraps	Beverly, MA	\$5,000	Food Assistance programs	12/7/2018	5417 CT
Camp Sunshine	Casco, ME	\$5,000	Camperships	12/7/2018	5418 CT
Centerboard	Lynn, MA	\$5,000	T.R.U.E Mentor Program	12/7/2018	5419 CT
Cradles to Crayons	Boston, MA	\$5,000	One Step to Basic Needs	12/7/2018	5420 CT
Cultural Center of Cape Cod	S Yarmouth, MA	\$5,000	General Operating	12/7/2018	5421 CT
Emerge	Cambridge, MA	\$5,000	Responsible Fatherhood	12/7/2018	5422 CT
Families for Depression Aware	Waltham, MA	\$5,000	Programs	12/7/2018	5423 CT
HAWC	Salem, MA	\$5,000	Homeless programs	12/7/2008	5424 CT
Horizons for Homeless Children	Roxbury, MA	\$5,000	Programs	12/7/2018	5425 CT
YMCA of the North Shore	Ipswich, MA	\$5,000	Summer Camp	12/7/2018	5426 CT
Jeanne Geiger Crisis Center	Newburyport, MA	\$5,000	Domestic Violence programs	12/7/2018	5427 CT
Lowell House	Lowell, MA	\$5,000	Zack's House	12/7/2018	5428 CT
Maine Recovery Fund	Portland, ME	\$10,000	Employment Kits for addicts	12/7/2018	5429 CT
Mission Is Possible	Greenville, RI	\$5,000	General	12/7/2018	5430 CT
Morgan Memorial	Boston, MA	\$5,000	Job training program	12/7/2018	5431 CT
NAMI	Hyannis, MA	\$5,000	Collaborative Problem Solving	12/7/2018	5432 CT
Our Neighbors Table	Amesbury, MA	\$5,000	Food Assistance programs	12/7/2018	5433 CT
Raising A Reader	Boston, MA	\$5,000	Lynn reading program	12/7/2018	5434 CT
REACH	Waltham, MA	\$5,000	Domestic Violence programs	12/7/2018	5435 CT
Samaritans	Boston, MA	\$5,000	Youth Suicide Prevention	12/7/2018	5436 CT
Self Esteem Boston	Jamaica Plain, MA	\$5,000	Programs	12/7/2018	5437 CT
Steps To Success	Brookline, MA	\$5,000	College Success Initiative	12/7/2018	5438 CT
United South End Settlements	Boston, MA	\$2,500	Camp Hale	12/7/2018	5439 CT
Windrush Farms	Boxford, MA	\$5,000	Programs	12/7/2018	5440 CT
The Wish Project	Lowell, MA	\$2,500	Home goods for low income	12/7/2018	5441 CT
Total Social Welfare		\$130,000			
Religion					
Cape Cod Church	E, Falmouth, MA	\$5,000	Summer Camp	12/7/2018	5448 CT
Dormition of the Virgin Mary	Somerville, MA	\$10,000	In memory of Katsoulis	12/7/2018	5443 CT
St Nicholas Church	Lexington, MA	\$3,000	Greek Festival	9/26/2018	5082 CT
Total Religion		\$18,000			
Total Donations 2018		\$208,000			

STAPLES

THOMAS ANTHONY PAPPAS CHARITABLE FOUNDATION, INC.

990-PF - 2018 - 51-0153284 - PART II + PART I

	Initials	Date
Prepared By		
Approved By		

	1	2	3	4
1	PART II - LINE 14	1-1-2018	ADDITIONS	12-31-2018
2	BALANCE - EQUIPMENT + FURN.	103024	13400	116424
3	ACCUMULATED DEPRECIATION	95933	2122	98055
4	REMAINDER	7091	11278	18369
5				
6				
7	PART I - SCHEDULES - LINE 18 - TAXES	COL A	COL A	COL C
8	TAXES - PAYROLL	27452	14934	14934
9	COMM OF MASS. - PG	35	35	35
10	COMM OF MASS. - AR	15	15	15
11		27502	14984	14984
12				
13				
14	PART I - LINE 23 - OTHER EXPENSES			
15	INSURANCE	67375	33688	33688
16	TELEPHONE	3939	1970	1970
17	OFFICE EXPENSE	16794	8397	8397
18		88108	44055	44055
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PART XV b

THOMAS ANTHONY PAPPAS
CHARITABLE FOUNDATION, INC.
POST OFFICE BOX 463
BELMONT, MASSACHUSETTS 02478
(781) 862-2802

FID # 51-0153284

To apply for a grant from the Thomas Anthony Pappas Charitable Foundation, please submit a letter, preferably not exceeding three pages, describing the project/program for which the grant is being sought. In addition, please include the following: a brief history of the organization, a list of directors and staff, a copy of your most recent financial statements, the proposed project or program budget with reference to other funding sources, and a copy of your tax-exempt status.

If any additional information is required, a representative from the Foundation Office will contact you. The Board meets quarterly, and as required. Proposal submission deadline is September thirtieth of each calendar year. Since proposals are reviewed throughout the year, we encourage you to submit your request before the September thirtieth deadline.

Sincerely,

Betsy P. Demirjian
Executive Vice President

PART XV - LINE 2d - RESTRICTIONS

NO PRIVATE FOUNDATIONS WILL BE CONSIDERED
WITHOUT COMPLETE EXPENDITURE CONTROL