EXTENDED TO FEBRUARY 18, 2020

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

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

Inter	nal Rev		rs.gov/Form990PF for Instr	uctions and the latest init		Open to Public Inspection
For	calen	dar year 2018 or tax year beginning APR	<u>1, 2018</u>	, and ending	MAR 31, 2019	
Na	me of	foundation			A Employer identification	number
S	OU	TH SHORE BANK CHARITABLE	Ξ			
F	OUI	NEATION, INC.			04-3356807	
		nd street (or P O box number if mail is not delivered to street a	ddress)	Room/suite	B Telephone number	
1	530	MAIN STREET			781-337-30	00
		own, state or province, country, and ZIP or foreign p	ostol oodo		1.	
		FH WEYMOUTH, MA 02190	usiai coue		C If exemption application is pe	ending, check here
			<u> </u>			
G	леск	all that apply: [Initial return		ormer public charity	D 1 Foreign organizations	, cneck nere
		Final return	Amended return		2 Foreign organizations me check here and attach col	eting the 85% test
		Address change	Name change	······································	check here and attach con	mputation
H ($\overline{}$	type of organization X Section 501(c)(3) ex		04	E If private foundation sta	
<u></u>			Other taxable private founda	ation C	under section 507(b)(1)	(A), check here
		rket value of all assets at end of year J Accounti	-	Acciual	F If the foundation is in a	60-month termination
(f	rom P		her (specify)		under section 507(b)(1)	(B), check here
_	\$		nn (d) must be on cash basi	s)	<u> </u>	· · · · · · · · · · · · · · · · · · ·
P	art I	Analysis of Revenue and Expenses (The total of amounts in columns (b), (c) and (d) may not	(a) Revenue and	(b) Net investment	(c) Adjusted net	(d) Disbursements for charitable purposes
		necessarily equal the amounts in column (a)	expenses per books	income	income	(cash basis only)
		Contributions, gifts, grants, etc., received		y "The part to	N/A #	
	2	Check X of the foundation is not required to attach Sch. B	· · · · · · · · · · · · · · · · · · ·	1.04	tone tot a	:
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	144,094.	144,094.		STATEMENT 1
	5a	Gross rents				
	ļь	Net rental income or (loss)	, , ,, ,	,	٠٠,٠,٠,٠,٠,٠,٠,٠,٠,٠,٠,٠,٠,٠,٠,٠,٠,٠,٠	1
	6a	Net gain or (loss) from sale of assets not on line 10	22,940.	0 2 *		
Revenue	ь	Gross sales price for all assets on line 6a 628,244.	411.0	. 4	, "H	
٥	7	Capital gain net income (from Part IV, line 2)	* ***	22,940.	T	
å	8	Net short-term capital gain	N 10	•		
	1	Income modifications	• , ,			
		Gross sales less returns	ì	<u> </u>	7	4 4
	Ι.	Less Cost of goods solo	, ,	3 1 Y	0	• 1
	1	Gross profit or (loss)		٠. ،		
	1	Other income		·	<u> </u>	, , ,
	1	Total Add lines 1 through 11	167,034.	167,034.	\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	I .
	13	Compensation of officers, directors trustees, etc	0.	.0.	 	0.
	í	Other employee salaries and wages	<u> </u>			7
		Pension plans, employee benefits	— ·- ·- ·- ·- ·- ·- ·- ·- ·- ·- ·- ·- ·-		SECENTE	1
ď	1	Legal fees			11-1-	(i)
ď	100	Accounting fees	ļ 	1.7	2 5 2019	SO6
Fxnenses		Other professional fees		120	NOV 2 6 2013	追
		Interest		187	-,,+	
Ž	18	Taxes STMT 2	3,708.		SOUTH !	0.
4	10		3,700.	10.5	Carl Control	
တ္ဆန္တ	19	Depreciation and depletion				1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
\mathbf{Q}	20	Occupancy				
Z	21	Travel, conferences, and meetings				
Z	22	Printing and publications	25 466	25,466.		
CANNED STATES	23	Other expenses STMT 3	25,466.	23,400.	ļ	0.
- tex		Total operating and administrative	20 174	25 466		_
≒ ₹		expenses Add lines 13 through 23	29,174.	25,466.	<u> </u>	0.
N 2		Contributions, gifts, grants paid	180,800.	A P	+ + -,	180,800.
در		Total expenses and disbursements	000 001	05 466		400 000
		Add lines 24 and 25	209,974.	25,466.	ļ	180,800.
6 2020 -	27	Subtract line 26 from line 12.		1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1	1 , 20%, 1	, <u> </u>
ฐ	a	Excess of revenue over expenses and disbursements	-42,940.	# 15 TO	es	
	b	Net investment income (if negative, enter -0-)	Ye	141,568.	17 4 6	11.
•		Adjusted not income (if penalting actor 0.)	المراجعة المستراجعة المستراجعة	lie i e iki o	N7 / Z	

Form **990-PF** (2018)

Form 990-PF (2018)

FOUNDATION, INC.

04-3356807

Page 2

Part	Balance Sheets Attached schedules and amounts in the description	Beginning of year	End of	year
Fail	column should be for end of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
1	Cash - non-interest-bearing	36,432.	36,774.	36,774.
9	Savings and temporary cash investments	292,119.	110,111.	110,111.
	Accounts receivable	·	1	1 1
"	Less' allowance for doubtful accounts	····		
١.				
4	Pledges receivable -			
	Less, allowance for doubtful accounts			
5	F			
6	Receivables due from officers, directors, trustees, and other			
	disqualified persons			
7	Other notes and loans receivable			•
1	Less: allowance for doubtful accounts			<u> </u>
8 ام	Inventories for sale or use			
Assets				
¥ 10	a Investments - U.S. and state government obligations			······································
1	b Investments - corporate stock STMT 4	2,913,134.	2,968,326.	2,968,326.
- 1		2,515,154.	2,300,3201	2,300,3201
- 1	c Investments - corporate bonds	***		
11	Investments land, buildings, and equipment basis	\$ · · ·		<u> </u>
	Less accumulated depreciation			
12	Investments - mortgage loans			
13	Investments - other			·
14	Land, buildings, and equipment basis	, , , , , , , , , , , , , , , ,		
	Less accumulated depreciation			
15	Other assets (describe ►)			
1 1	Total assets (to be completed by all filers - see the			······································
"	instructions. Also, see page 1, item I)	3,241,685.	3,115,211.	3,115,211.
- 17	Accounts payable and accrued expenses	970 = 27 0 0 0		, , , , , , , , , , , , ,
				· · · · · · · · · · · · · · · · · · ·
18	· · ·			1
9 ا				
abilities 50	F-			
	· · · · · · · · · · · · · · · · · · ·			
7 22	Other liabilities (describe)		<u> </u>	
23	Total liabilities (add lines 17 through 22)	0.	0.	
	Foundations that follow SFAS 117, check here			•
j	and complete lines 24 through 26, and lines 30 and 31			
S 24	Unrestricted			•
E 25				
Bala 26	· · · · · · · · · · · · · · · · · · ·		·	
or Fund Balance				,,,
Š	j.			• •
<u></u>	and complete lines 27 through 31		^	
		0.	0.	
SSets	The state of the s	0.	0.	
∢ 29	Retained earnings, accumulated income, endowment, or other funds	3,241,685.	3,115,211.	
₹ 30	Total net assets or fund balances	3,241,685.	3,115,211.	- '
_	į			
31	Total liabilities and net assets/fund balances	3,241,685.	3,115,211.	
	Analysis of Changes in Net Assets or Fund Bal	ances ,		
Parl	Analysis of Onlinges in Net Assets of Fund Dai	ances		
1 Tot	al net assets or fund balances at beginning of year - Part II, column (a), line 3	0		
	ust agree with end-of-year figure reported on prior year's return)		1	3,241,685.
	er amount from Part I, line 27a			-42,940.
			2	-42,940.
	er increases not included in line 2 (itemize)		3	
	d lines 1, 2, and 3	TTOED CLING	4	3,198,745.
	creases not included in line 2 (itemize) CHANGE IN UNREA			83,534.
6 Tot	al net assets or fund balances at end of year (line 4 minus line 5) - Part II, colo	umn (b), line 30	6	3,115,211.
				Form 990-PF (2018)

FOUNDATION, INC. Form 990-PF (2018)

04-3356807 Page 3

Part IV Capital Gains ar	nd Losses for Tax on In	vestment	Income						
	e kind(s) of property sold (for exa chouse; or common stock, 200 sha		te,	(b)	How ac - Purc - Dona	cquired hase ation	(c) Date (mo., d		(d) Date sold (mo., day, yr)
1a SALE OF INVESTM	ENTS					P			
b				igsqcup					
	- 		·	<u> </u>					
<u>d</u>				⊢					
<u>e</u>	(O Decreased and a set of	() 0	-44b b	Щ			(1) 0		<u></u>
(e) Gross sales price	(f) Depreciation allowed (or allowable)		st or other basis expense of sale					ain or (loss s (f) minus	(g))
a 628,244.			605,30	4.					22,940.
<u>b</u>		ļ							
<u>c</u>				\dashv		- vn			
<u>d</u>		 							
Complete only for assets showing	gain in column (h) and owned by	the foundation	on 12/31/69	\dashv		(1)	Gains (C	ol (h) gain	minus
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Ex	cess of col (i) col. (j), if any				(k), but r	not less tha (from col. (n -0-) or
	as 01 12/3 1/09	UVEI	COI. (J), II ally			 -		·	22 040
<u>a</u>		 							22,940.
<u>b</u>		 	 						
c d				$\neg \uparrow$					
e		<u> </u>							
	∫ If gain, also ente	r in Part I line	7	٦					
2 Capital gain net income or (net capi	4				2				22,940.
3 Net short-term capital gain or (loss		nd (6):		۱۲	[
If gain, also enter in Part I, line 8, could be seen the second of the second s	olumn (c).				ا ،			N/A	
Part V Qualification Un	der Section 4940(e) for	Reduced	Tax on Net	nve	stme	ent Inco	me	14/21	
(For optional use by domestic private for	oundations subject to the section	4940(a) tax on	net investment in	come.	.)	*******			**************************************
	•	, , ,			•				
If section 4940(d)(2) applies, leave this									
Was the foundation liable for the section				ıod?					Yes X No
If "Yes," the foundation doesn't qualify 1 Enter the appropriate amount in ea				atrine		-			
(a)		iisti uctions bei	ore making any er		•		_		(d)
Base periód years Calendar year (or tax year beginning	(b) Adjusted qualifying dis	stributions	Net value of no	(c) nchar		use assets		Distril	(d) bution ratio vided by col. (c))
2017	"'9	1,997.		3	.01	1,669		(coi. (b) di	.047149
2016		0,460.		2	,61	4,589			.053722
2015		7,116.				7,552			.050896
2014		8,479.				5,531			.052752
2013	10	7,122.		2	,06	1,661			.051959
		•							056450
2 Total of line 1, column (d)							2		.256478
3 Average distribution ratio for the 5-		on line 2 by 5.0	0, or by the number	er of y	/ears				051206
the foundation has been in existence	e it less than 5 years						3		.051296
4 Enter the net value of noncharitable	-use assets for 2018 from Part Y	line 5					4		3,107,303.
4 Enter the net value of nonenaritable	dac assets for 2010 from 1 art A,	mic 5							3,107,303.
5 Multiply line 4 by line 3							5		159,392.
6 Enter 1% of net investment income	(1% of Part I, line 27b)						6		1,416.
									160 000
7 Add lines 5 and 6							7		160,808.
8 Enter qualifying distributions from I	Part XII, line 4						8		180,800.
If line 8 is equal to or greater than I See the Part VI instructions.	ine 7, check the box in Part VI, line	e 1b, and comp	olete that part usin	g a 19	% tax r	ate.			

, govern gyonn	DANK GWADIMANA					
	BANK CHARITABLE	.5	04-3356	:007		Dage
FOUNDATION, Part VI Excise Tax Based on Invest	tment Income (Section 49)	40(a) 4940(b) 4940(e) or 4	948 - see ir	struc		Page
			7.			<u>"</u>
1a Exempt operating foundations described in section			.		Ť	
Date of ruling or determination letter:			 		1,4	16
b Domestic foundations that meet the section 4940(6	s) requirements in Part V, check here	A and enter 1%	1-1-		<u> , 4 .</u>	10
of Part I, line 27b	h Current foreign avanguations antor	49/ of Port I lies 10 cel (h)				
c All other domestic foundations enter 2% of line 27l						0
2 Tax under section 511 (domestic section 4947(a)(i) trusts and taxable foundations only,	others, enter -u-)	2	 -	1,4:	
3 Add lines 1 and 2	(4) 4:		3	 :	<u>, 4</u>	0
4 Subtitle A (income) tax (domestic section 4947(a)(, others, enter -u-)	4	 ;	1 1	
5 Tax based on investment income Subtract line 4	from line 3. If zero or less, enter -U-		5		1,41	10
6 Credits/Payments		1. 1. 0.				
a 2018 estimated tax payments and 2017 overpayments		6a 0.	-			
b Exempt foreign organizations - tax withheld at sour		·	-{` `			
c Tax paid with application for extension of time to fi	le (Form 8868)	6c 0.	-			
d Backup withholding erroneously withheld			 			
7 Total credits and payments Add lines 6a through 6	_		7			0
8 Enter any penalty for underpayment of estimated t		ittached	8			<u>60</u>
9 Tax due If the total of lines 5 and 8 is more than li		▶	9		1,4	/ 0
O Overpayment If line 7 is more than the total of line	• •	- I	10			
1. Enter the amount of line 10 to be: Credited to 2019		Refunded >	11			
Part VII-A Statements Regarding A				T 1	Yes	No
1a During the tax year, did the foundation attempt to i	nfluence any national, state, or local leg	gislation or did it participate or intervent	e in	 	169	_
any political campaign?				1a		X
b Did it spend more than \$100 during the year (eithe			nition ,	1b		
If the answer is "Yes" to 1a or 1b, attach a detailed		is of any materials published or			- 4.	1 .
distributed by the foundation in connection with the					! -{	, T
c Did the foundation file Form 1120-POL for this year				1c		X
d Enter the amount (if any) of tax on political expend		_		1 1	:	
(1) On the foundation. > \$		· · · · · · · · · · · · · · · · · · ·	_			
e Enter the reimbursement (if any) paid by the found	ation during the year for political exper	nditure tax imposed on toundation		1 1	٠, ا	ii
managers ▶ \$ 0.		1000				X
2 Has the foundation engaged in any activities that h		E 1457.		2		_^
If "Yes," attach a detailed description of the activitie						1
3 Has the foundation made any changes, not previous		g instrument, articles of incorporation, o)r			
bylaws, or other similar instruments? If "Yes," attac				3		X
4a Did the foundation have unrelated business gross i		ear?		4a		Х
b If "Yes," has it filed a tax return on Form 990-T for			N/A	4b		
5 Was there a liquidation, termination, dissolution, o		arv	•	5		X
If "Yes," attach the statement required by General				,	:	
6 Are the requirements of section 508(e) (relating to	sections 4941 through 4945) satisfied	either			İ	l
 By language in the governing instrument, or 					-	
 By state legislation that effectively amends the graduate 	overning instrument so that no mandat	tory directions that conflict with the stat	e law			-
remain in the governing instrument?				6	Х	—
7 Did the foundation have at least \$5,000 in assets a	t any time during the year? If "Yes " cor	molete Part II col. (c), and Part XV		1 7	X	

8a Enter the states to which the foundation reports or with which it is registered. See instructions.

of each state as required by General Instruction G? If "No," attach explanation

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)

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

year 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV

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

Form 990-PF (2018)

8b

Pa	art 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	11		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	12	<u> </u>	X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	<u></u>
	Website address ► N/A			
14	The books are in care of ► DAN BRENNAN Telephone no. ► 781-68			
	Located at ► 1530 SOUTH MAIN STREET, SOUTH WEYMOUTH, MA ZIP+4 ►02	1190		
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	<u> </u>	/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,		Yes	
	securities, or other financial account in a foreign country?	16	 -	Х
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the	-	- 1	ļ
D.	foreign country ► art VII-B Statements Regarding Activities for Which Form 4720 May Be Required		<u> </u>	
		τ,	Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.	<u> </u>	163	140
18	a During the year, did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes X No		, ,	
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)	•) ^ i	
	a disqualified person?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	٠.	; -	
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes X No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available		<u>-</u>	١.
	for the benefit or use of a disqualified person)? Yes X No	``'	40000000000000000000000000000000000000	<u>۱</u> ۰.
	(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	•	3	
	termination of government service, if terminating within 90 days.) Yes X No	}		
ь	b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations			١.
	section 53 4941(d)-3 or in a current notice regarding disaster assistance? See instructions N/A	1b	ļ —	
	Organizations relying on a current notice regarding disaster assistance, check here	1.5	T .	
	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	-	is as	
٠	before the first day of the tax year beginning in 2018?	1c		Х
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation	···	<u> </u>	
_	defined in section 4942(j)(3) or 4942(j)(5)):		,	١.
a	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	1	٠.	
_	before 2018? Yes X No	1,		
	If "Yes," list the years \blacktriangleright ,, ,, ,,]]	
t	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	2b		
C	th the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.			
	>			
3 a	a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time	1	7.	,
	during the year?			
t	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	1		1
	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		٠.	
	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,	L	<u> </u>	L
	Form 4720, to determine if the foundation had excess business holdings in 2018.) N/A	3b	ļ	<u> </u>
	a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
t	b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that	<u></u>	<u> </u>	<u> </u>
	had not been removed from jeopardy before the first day of the tax year beginning in 2018?	1 4h	1	ĺΧ

Page 6

Part VII-B Statements Regarding Activities for Which F	orm 4/20 May Be R	equirea _{(contini}	ued)			
5a During the year, did the foundation pay or incur any amount to:				\Box	Yes	No
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	4945(e))?	Ye	es 🗓 No			•
(2) Influence the outcome of any specific public election (see section 4955); or	r to carry on, directly or indire	ectly,	Ĭ	- [
any voter registration drive?		Ye	s X No	l		
(3) Provide a grant to an individual for travel, study, or other similar purposes	7	Y6	es X No			
(4) Provide a grant to an organization other than a charitable, etc., organization	n described in section			[
4945(d)(4)(A)? See instructions		Ye	es X No			
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or f			ļ		
the prevention of cruelty to children or animals?			s X No	ł		1
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und		n Regulations				
section 53 4945 or in a current notice regarding disaster assistance? See instru	ictions		N/A	5b		
Organizations relying on a current notice regarding disaster assistance, check h	ere		▶∟		İ	,
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fr				ŀ	٠.	
expenditure responsibility for the grant?	N	I/A	:s No]	٠		
If "Yes," attach the statement required by Regulations section 53.4945-5(d).			İ	` [1	•
6a Did the foundation, during the year, receive any funds, directly or indirectly, to p	pay premiums on					
a personal benefit contract?		Ye	es 🗶 No			
b Did the foundation, during the year, pay premiums, directly or indirectly, on a property of the foundation of the property	ersonal benefit contract?	,	_	6b		X
If "Yes" to 6b, file Form 8870.				.	٠,٠	
7a At any time during the tax year, was the foundation a party to a prohibited tax s		Ye	S LAL NO L		_^	· · ·
b If "Yes," did the foundation receive any proceeds or have any net income attribu			N/A L	7b		
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$	1,000,000 in remuneration or					
excess parachute payment(s) during the year?			s X No	<u></u>	F3, 7	
Part VIII Information About Officers, Directors, Truste	es, Foundation Mar	nagers, Highly				
Paid Employees, and Contractors	*					
List all officers, directors, trustees, and foundation managers and the		(c) Compensation	(d) Contributions to	т —	- 1 5 100	
(a) Name and address	(b) Title, and average hours per week devoted	(If not paid,	(d) Contributions to employee benefit plans and deferred	ac	e) Expo count,	ense other
(b) hand and address	to position	`enter'-0-)	compensation	a	illowar	nces
						_
SEE STATEMENT 5	_ 	0.	0.	—		0.
· · · · · · · · · · · · · · · · · · ·						
				₩		
				1		
				ــــــ		
			<u> </u>	<u> Ш</u>		
2 Compensation of five highest-paid employees (other than those incl		enter "NUNE."	(d) Contributions to	T .	a) Eva	once
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week	(c) Compensation	(d) Contributions to employee benefit plans and deferred	ac	e) Exp.	other
	devoted to position		compensation	^a	allowar	nces
NONE						
				├		
		ļ		₩		
		(1		
				↓		
· · · · · · · · · · · · · · · · · · ·						
				ــــــ		
		, ,				
			<u> </u>	<u>L</u>		
Total number of other employees paid over \$50,000						Ω

SOUTH SHORE BANK CHARITABLE

Part VIII Information About Officers, Directors, Trustees, Foun Paid Employees, and Contractors (continued)	dation Managers, Highly	5356807 Page 7
3 Five highest-paid independent contractors for professional services. If none, er	nter "NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
		
T		
Total number of others receiving over \$50,000 for professional services Part IX-A Summary of Direct Charitable Activities	· · · · · · · · · · · · · · · · · · ·	<u>▶</u> 0
List the foundation's four largest direct charitable activities during the tax year. Include relevant sinumber of organizations and other beneficiaries served, conferences convened, research papers p	tatistical information such as the produced, etc.	Expenses
1 NONE	,	
		^
2		0.
2		
3		
4		
Part IX-B Summary of Program-Related Investments		- X
Describe the two largest program-related investments made by the foundation during the tax year	on lines 1 and 2.	Amount
1 NONE		
		0
2		0.
2		
All other program-related investments See instructions.	_	
3		
Total. Add lines 1 through 3	>	0.

Form **990-PF** (2018)

Form 990-PF (2018)

Part Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.) Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: 2,923,345. a Average monthly fair market value of securities 1a 277. b Average of monthly cash balances 231. 1b c Fair market value of all other assets 10 3,154,622 d Total (add lines 1a, b, and c) 1đ e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 2 Acquisition indebtedness applicable to line 1 assets 622 Subtract line 2 from line 1d 3 319 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) 4 3,107,303. Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4 5 Minimum investment return Enter 5% of line 5 155. 365 Rartixin 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.) 155,365. Minimum investment return from Part X, line 6 1 1,416. Tax on investment income for 2018 from Part VI, line 5 Income tax for 2018 (This does not include the tax from Part VI) 416 Add lines 2a and 2b 2c 3 Distributable amount before adjustments. Subtract line 2c from line 1 3 Recoveries of amounts treated as qualifying distributions Add lines 3 and 4 5 Deduction from distributable amount (see instructions) 6 153 949 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 Part XIII Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: 180,800. a Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 1a Program-related investments - total from Part IX-B 1b Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes 2 44 (Amounts set aside for specific charitable projects that satisfy the: 3 a Suitability test (prior IRS approval required) За **b** Cash distribution test (attach the required schedule) 3b 180,800. Qualifying distributions Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4 4 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment ,416 income Enter 1% of Part I, line 27b 6 Adjusted qualifying distributions Subtract line 5 from line 4

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

Form 990-PF (2018)

4940(e) reduction of tax in those years.

Page 9

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 、				153,949.
2 Undistributed income, if any, as of the end of 2018			•	
a Enter amount for 2017 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2018.			···· <u></u> ·	
a From 2013 6,638.				
b From 2014 9, 202.				
c From 2015 3,687.			' !	
d From 2016 10,325.			•	
e From 2017				
f Total of lines 3a through e	29,852.			
4 Qualifying distributions for 2018 from	· · · · · · · · · · · · · · · · · · ·			
Part XII, line 4: ►\$ 180,800.			•	., , .
a Applied to 2017, but not more than line 2a			0.	
b Applied to undistributed income of prior				
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus				
(Election required - see instructions)	0.		· · · · · · · · · · · · · · · · · · ·	
d Applied to 2018 distributable amount			· · · · · · · · · · · · · · · · · · ·	153,949.
e Remaining amount distributed out of corpus	26,851.		'	, ,
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount	0.		, ,	0.
6 Enter the net total of each column as		,	•	
indicated below:	56,703.	,	•	
a Corpus Add lines 31, 4c, and 4e Subtract line 5 b Prior years' undistributed income. Subtract	30,703.			1
line 4b from line 2b		0.	. 1	
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed	·	0.	•	
d Subtract line 6c from line 6b. Taxable				
amount - see instructions		0.		
e Undistributed income for 2017. Subtract line		.		
4a from line 2a. Taxable amount - see instr.		* *	0.	
f Undistributed income for 2018. Subtract		· · · · · ·		
lines 4d and 5 from line 1. This amount must	}		•	
be distributed in 2019				0.
7 Amounts treated as distributions out of		•	,	
corpus to satisfy requirements imposed by	}	•		
section 170(b)(1)(F) or 4942(g)(3) (Election	_			
may be required - see instructions)	0.			
8 Excess distributions carryover from 2013	6 620		' . ·	
not applied on line 5 or line 7	6,638.		<u> </u>	
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	50,065.		• •	
	30,003.			
Analysis of line 9: a Excess from 2014 9,202.				
b Excess from 2015 3, 687.	İ		•	
c Excess from 2016 10, 325.	}			
d Excess from 2017				
e Excess from 2018 26,851.		,	•	,
25.5000 nom 2010 20/0011				5 000 PE (0010)

SOUTH SHORE BANK CHARITABLE FOUNDATION. 04-3356807 Form 990-PF (2018) INC. Page 10 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 4942(j)(3) or 4942(1)(5 b Check box to indicate whether the foundation is a private operating foundation described in section Prior 3 years 2 a Enter the lesser of the adjusted net Tax year (d) 2015 (a) 2018 (b) 2017 (c) 2016 (e) Total 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 Complete 3a, b, or c for the alternative test relied upon. j 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 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 Gress investment income Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets Part XV at any time during the year-see instructions.) 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. 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 SEE STATEMENT 6 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;

SOUTH SHORE BANK CHARITABLE FOUNDATION, INC. 04-3356807 Page 11 Supplementary Information (continued) Part XV 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Recipient Purpose of grant or contribution Foundation show any relationship to any foundation manager Amount status of Name and address (home or business) recipient or substantial contributor a Paid during the year PLEASE SEE ATTACHMENT NOT RELATED ÞС EXEMPT PURPOSE ON FILE - DETAILS UPON REQUEST WEYMOUTH, MA 02190 180,800.

Total			► 3a	180,800.
h Approved for future payment				
NONE				
	·			
Total		 	▶ 3b	0.

Form 990-PF (2018)

Part XVI-A Analysis of Income-Producing Activities

					
Enter gross amounts unless otherwise indicated	(a) Business	(b)	Exclu- sion	(d)	(e) Related or exempt
1 Program service revenue:	code	Amount	code	Amount	function income
a	_		+		
b	_		+	_ 	
C	_		+		
d	_		\bot		
e	_				
f					<u> </u>
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	144,094.	
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			1 1		
property			\bot		
7 Other investment income		, , , , , , , , , , , , , , , , , , ,			
8 Gain or (loss) from sales of assets other					
than inventory			18	22,940.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue.					
a	_				
b	_ [
C					
d	1 1				
e					
12 Subtotal. Add columns (b), (d), and (e)		0		167,034.	0.
13 Total Add line 12, columns (b), (d), and (e)				13	167,034.
(See worksheet in line 13 instructions to verify calculations	s.)				
Part XVI-B Relationship of Activitie	s to the Accon	nplishment of E	xempt Pu	rposes	
Line No Explain below how each activity for which					lishment of
the foundation's exempt purposes (other to					
					
			··········		
					
		<u>,-</u>	***********		
					
					······································
					

8) FOUNDATION, INC. 04-3356807
Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations Form 990-PF (2018) Part XVII

1					g with any other organization	n described in secti	on 501(c)	-	Yes	No
		an section 50 ((c)(3) organi s from the reporting founda		_	to political organizations?					
d	(1) Cash		mon to a nonchantable t	exempt org	anization of.			1a(1)		
	(1) Odsii							1a(2)		X
h	Other tran							18(2)		
U		s of assets to a noncharitat	nle exempt organization					1b(1)		X
	` '	chases of assets from a non	. •	nization				1b(2)		<u>x</u>
		tal of facilities, equipment, (nzation				1b(3)		<u>x</u>
	` '	nbursement arrangements	or other absolu					1b(4)		X
		ns or loan guarantees						1b(5)		X
	` '	ormance of services or mer	mbership or fundraising	solicitation	าร			1b(6)		X
c		of facilities, equipment, mai	•					1c		X
						vavs show the fair r	narket value of the goods, or	ther assi	ets,	********
				-	• •		or sharing arrangement, sh		•	
		d) the value of the goods, of								
3)L	ine no	(b) Amount involved		L	exempt organization	(d) Description	of transfers, transactions, and sh	aring arra	ngemen	ts
				N/A						
							······································			
							·			
					·,					
						<u> </u>				
			<u> </u>							
2a					or more tax-exempt organiz	zations described	,			٦
Ċ		n 501(c) (other than section		n 527?			L_	Yes	X] No
b	If "Yes," c	complete the following sche			763 T		/			
		(a) Name of org	anization		(b) Type of organization		(c) Description of relationsh	<u>ір</u>		
		N/A				-				
										
									.	
										
	Unde	r penaltieSof persury I declare ti	hat I have examined this retur	rn includina	accompanying schedules and sta	atements, and to the be	st of my knowledge			
Sid					laxpayer) is based on all informat		as any knowledge retur	the IRS d n with the	prepare	er e
He	re	· V M	Lind	۱/-	~ 1 Hh7	PRESI		vn below?	See ins	7 .
	Z	nature of officer or trustee		Y /	Dete	Title	ENI	Yes		No
	- Tong	P/int/Type preparer's na		eparer's si		Date	Check If PTIN			
		The property stia	(operor 3 31		Duite	self- employed			
Pa	id	GIUSEPPE FI	EMTA CDACI	ינוכלים	PE FEMIA, C	11/14/19	· · ·	438	212	
	eparer	Firm's name ► GER				11/14/17	Firm's EIN ▶ 04-25			
	e Only		WHO I. VEIL	יידי (עב	COMPANI		riinstin > 04-23	134.	LU	
	· · · · · · ·	Firm's address ▶ 42	A ADAMS STO	ਾਤਤ			 			
			LTON, MA 02				Phone no 617-69	6-80	200	
		1 111.	LIVE, MA UZ					rm 99 0		(2010)
							ru	550		(2010)

FORM 990-PF	DIVIDENDS	S AND INTER	EST FROM SECUP	ITIES S'	PATEMENT 1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDEND	REVENUE	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
DIVIDEND INCOME INTEREST INCOME	140,984		0. 140,984. 0. 3,110.		
TO PART I, LINE 4	144,094		0. 144,094.	144,094.	
FORM 990-PF		TAX	ES	S	FATEMENT 2
DESCRIPTION		(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL & STATE		3,708.	0.		0.
TO FORM 990-PF, PG	1, LN 18 =	3,708.	0.	,	0.
FORM 990-PF		OTHER E	XPENSES	S	ratement 3
DESCRIPTION	•	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
	-	25,466.	25,466.		0.
CUSTODIAN FEE		,			

FORM 990-PF CORPORATE STOC	CORPORATE STOCK		
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
SECURITIES	2,968,326.	2,968,326.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	2,968,326.	2,968,326.	

FORM 990-PF			LIST OF OFFICERS, DIRECTORS AND FOUNDATION MANAGERS		STATEMENT 5	
NAME AND ADDRESS			TITLE AND AVRG HRS/WK			EXPENSE
ARTHUR H. SHARP 1530 MAIN STREET SOUTH WEYMOUTH, MA	A 02190		DIRECTOR 1.00	0.	0.	0.
PAMELA O'LEARY 1530 MAIN STREET SOUTH WEYMOUTH, MA	A 02190		VP/DIRECTOR 1.00	0.	0.	0.
JAMES M. DUNPHY 1530 MAIN STREET SOUTH WEYMOUTH, MA	A 02190		PRESIDENT/DIRE	ECTOR . 0.	0.	0.
MARIELLE HARDIMAN 1530 MAIN STREET SOUTH WEYMOUTH, MA			DIRECTOR 1.00	0.	0.	·0 .
DANIEL BRENNAN 1530 MAIN STREET SOUTH WEYMOUTH, MA	A 02190		TREASURER 1.00	0.	0.	0.
J. LEONARD BICKNE 1530 MAIN STREET SOUTH WEYMOUTH, MA			DIRECTOR 1.00	0.	0.	0.
JOSEPH C. SULLIVAI 1530 MAIN STREET SOUTH WEYMOUTH, M			DIRECTOR 1.00	0.	0.	0.
MARISA O'DWYER 1530 MAIN STREET SOUTH WEYMOUTH, M	A 02190		DIRECTOR 1.00	0.	0.	0.
PAUL M. PECCI 1530 MAIN STREET SOUTH WEYMOUTH, M	A 02190		DIRECTOR 1.00	0.	0.	0.
TOTALS INCLUDED OF	N 990-PF, PA	GE 6,	PART VIII	0.	0.	0.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION PART XV, LINES 2A THROUGH 2D

STATEMENT 6

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

JAMES M. DUNPHY, PRESIDENT 1530 SOUTH MAIN STREET SOUTH WEYMOUTH, MA 02190

TELEPHONE NUMBER

781-337-3000

FORM AND CONTENT OF APPLICATIONS

APPLICATIONS AVAILABLE AT ABOVE ADDRESS

ANY SUBMISSION DEADLINES

SEE APPLICATIONS FOR VARIOUS DEADLINES

RESTRICTIONS AND LIMITATIONS ON AWARDS

AWARDS ARE TO BE GRANTED WITHIN SOUTHEASTERN MASSACHUSETTS, UNLESS AN EXCEPTION IS MADE BY THE BOARD OF DIRECTOR'S TO BENEFIT COMMUNITY, CHARITABLE, EDUCATIONAL, AND OTHER BENEVOLENT PURPOSES.