## **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.

Department of the Treasury Internal Revenue Service ► Go to www irs gov/Form990PF for instructions and the latest information JUL 1, 2018 JUN 30, For calendar year 2018 or tax year beginning , and ending A Employer identification number Name of foundation Cecile Higginson Murphy 04-3447397 Charitable Foundation Number and street (or P O box number if mail is not delivered to street address) Room/suite B Telephone number (617) 248-4760 Choate LLP PO Box 961019 City or town, state or province, country, and ZIP or foreign postal code C If exemption application is pending, check here Boston, MA 02196 Initial return of a former public charity D 1. Foreign organizations, check here G Check all that apply Initial return Final return Amended return 2. Foreign organizations meeting the 85% test, check here and attach computation Address change Name change X Section 501(c)(3) exempt private foundation H Check type of organization: E If private foundation status was terminated Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation under section 507(b)(1)(A), check here (from Part II, col. (c), line 16)

\$ 7,708,809.

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and necessarily equal the amounts in column (a)

1 Contributions, gifts, grants, etc., received to the contributions of the foundation is not required to a linterest on savings and temporary cash investments

4 Dividends and interest from securities a Gross rents

5 a Gross rents

6 Net rental income or (loss)

6 A Net gain or (loss) from sale of assets not on Gross sales price for all 5,56!

7 Capital gain net income (from Part IV, line 2)

8 Net short-term capital gain I Fair market value of all assets at end of year J Accounting method: X Cash Accrual If the foundation is in a 60-month termination Other (specify) under section 507(b)(1)(B), check here 7,708,809. (Part I, column (d) must be on cash basis.) (d) Disbursements (b) Net investment (c) Adjusted net (a) Revenue and (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) for charitable purposes (cash basis only) expenses per books income ıncome 754,062. N/A Contributions, gifts, grants, etc., received 2 Check If the foundation is not required to attach Sch B 7,246. 7,246. Statement 149,343 149,343 Statement 480,958 6a Net gain or (loss) from sale of assets not on line 10 5,565,202. SS 480,958 Ę. ш Income modifications 10a Gross sales less returns and allowances b Less Cost of goods sold c Gross profit or (loss) 3 <1,916. <1,776. Statement 11 Other income ,389,693 635,771 12 Total. Add lines 1 through 11 0. 0 13 Compensation of officers, directors, trustees, etc. 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees 1,200. 2,400. 1,200 Stmt 4 **b** Accounting fees 51,404 69,465 18.061. Stmt 5 c Other professional fees 17 Interest Ō. 3,819. 18 Taxes Stmt 6 28,431. 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications 125. Stmt 7 125. 23 Other expenses 24 Total operating and administrative 100,421 56,423 19,386. expenses Add lines 13 through 23 280,000. 280,000. 25 Contributions, gifts, grants paid 26 Total éxpenses and disbursements. 299,386. 380,421 56,423 Add lines 24 and 25 27 Subtract line 26 from line 12 1,009,272 8 Excess of revenue over expenses and disbursements 579,348. b Nettinvestment income (if negative, enter -0-) N/A C Adjusted net income (if negative, enter -0-)

823501 12-11-18 LHA For Paperwork Reduction Act Notice, see instructions.

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| -                           | 1111 3. | Charleable Foundation  | Beginning of year |                                 | funne                     |
|-----------------------------|---------|--|-------------------|---------------------------------|---------------------------|
| F                           | art     | Balance Sheets Attached schedules and amounts in the description column should be for end of year amounts only | (a) Book Value    | End o<br>( <b>b)</b> Book Value | (c) Fair Market Value     |
|                             |         | Cash - non-interest-bearing Savings and temporary cash investments Accounts receivable ►                       | 228,837.          | 366,063.                        | 366,063.                  |
|                             |         | Less: allowance for doubtful accounts ▶ Pledges receivable ▶   |                   |                                 |                           |
|                             | 1       | Less: allowance for doubtful accounts  |                   | <del></del>                     | <del></del>               |
|                             | 5       | Grants receivable  |                   |                                 |                           |
|                             | 1       | Receivables due from officers, directors, trustees, and other disqualified persons                             |                   |                                 |                           |
|                             | 7       | Other notes and loans receivable   |                   |                                 | _ <del></del>             |
|                             |         | Less: allowance for doubtful accounts  |                   | . <del></del>                   | <del></del>               |
| S                           | 8       | Inventories for sale or use  |                   |                                 | <del></del>               |
| Assets                      | 9       | <u> </u>   |                   |                                 | <del></del>               |
| As                          | 10a     | Investments - U.S. and state government obligations  |                   | <del></del>                     | <del></del>               |
|                             |         | Investments - corporate stock Stmt 8   | 5,197,964.        | 5,181,269.                      | 5,181,269.                |
|                             | ا (     | Investments - corporate bonds Stmt 9   | 191,680.          | 481,064.                        | 481,064.                  |
|                             | 1       | Investments - land, buildings, and equipment basis   |                   | ·                               |                           |
|                             |         | Less accumulated depreciation  |                   |                                 |                           |
|                             | 12      | Investments - mortgage loans   |                   | <del>-</del>                    |                           |
|                             | 13      | Investments - other Stmt 10  | 1,335,544.        | 1,680,413.                      | 1,680,413.                |
|                             | 14      | Land, buildings, and equipment; basis ▶  | -                 |                                 |                           |
|                             |         | Less accumulated depreciation  |                   |                                 | <del></del>               |
|                             | 15      | Other assets (describe >   |                   |                                 |                           |
|                             | 16      | Total assets (to be completed by all filers - see the  |                   |                                 |                           |
|                             |         | instructions. Also, see page 1, item I)  | 6,954,025.        | 7,708,809.                      | 7,708,809.                |
| _                           | 17      | Accounts payable and accrued expenses  |                   |                                 | 1                         |
|                             | 18      | Grants payable   |                   |                                 | 3.5                       |
| Ş                           | 19      | Deferred revenue   |                   |                                 | 1                         |
| ij                          | 20      | Loans from officers, directors, trustees, and other disqualified persons                                       |                   |                                 | 1                         |
| Liabilities                 | 21      | Mortgages and other notes payable  |                   |                                 |                           |
|                             | 22      | Other liabilities (describe >)   |                   |                                 |                           |
|                             | 23      | Total liabilities (add lines 17 through 22)  | 0.                | 0.                              |                           |
| _                           | 1       | Foundations that follow SFAS 117, check here   |                   |                                 | <del></del>               |
|                             |         | and complete lines 24 through 26, and lines 30 and 31.   |                   |                                 | 1                         |
| es                          | 24      | Unrestricted   | 1                 | ľ                               |                           |
| auc                         | ı       | Temporarily restricted   |                   |                                 | <u> </u>                  |
| Bal                         | 1       | Permanently restricted   |                   |                                 |                           |
| ā                           |         | Foundations that do not follow SFAS 117, check here  |                   |                                 | i                         |
| 교                           | l       | and complete lines 27 through 31.  |                   |                                 | ·                         |
| ŏ                           | 27      | Capital stock, trust principal, or current funds   | 5,439,914.        | 5,375,464.                      | 1                         |
| set                         | 28      | Paid-in or capital surplus, or land, bldg., and equipment fund   | 0.                | 0.                              |                           |
| As                          | 29      | Retained earnings, accumulated income, endowment, or other funds   | 1,514,111.        | 2,333,345.                      | Ĭ                         |
| Net Assets or Fund Balances | 30      | Total net assets or fund balances  | 6,954,025.        | 7,708,809.                      | }                         |
|                             | ١,,     | Tabel Pakiliking and nakanaka Mandikalana  | 6,954,025.        | 7,708,809.                      | •                         |
| _                           | 31      | Total liabilities and net assets/fund balances   |                   | 1,700,003.                      |                           |
| P                           | art     | Analysis of Changes in Net Assets or Fund Ba   | lances            | _                               |                           |
|                             |         | net assets or fund balances at beginning of year - Part II, column (a), line 3                                 | 0                 |                                 |                           |
|                             |         | t agree with end-of-year figure reported on prior year's return)   |                   | 1                               | 6,954,025.                |
|                             |         | amount from Part I, line 27a   |                   | 2                               | 1,009,272.                |
|                             |         | increases not included in line 2 (itemize)   |                   | 3                               | 0.                        |
|                             |         | ines 1, 2, and 3   |                   | . 4                             | 7,963,297.                |
|                             |         | eases not included in line 2 (itemize)   Unrealized Loss   |                   |                                 | 254,488.                  |
| 6                           | Total   | net assets or fund balances at end of year (line 4 minus line 5) - Part II, col                                | umn (b), line 30  | 6                               | 7,708,809.                |
|                             |         |  |                   |                                 | Form <b>990-PF</b> (2018) |

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| Part IV Capital Gains   | and Losses for Tax on In                                 | vestmen                            | t 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 |  |                                    |                                      |          |         | acquired<br>day, yr) | (d) Date sold<br>(mo., day, yr.) |                                |                     |  |
| 1a Publicly Trade   | d Securities   |                                    |                                      |          |         |                      |                                  |                                |                     |  |
| ь Capital Gains   | Dividends  |                                    |                                      |          |         |                      |                                  |                                |                     |  |
| <u>c</u>  |  |                                    |                                      | l        |         |                      |                                  |                                |                     |  |
| <u>d</u>  |  |                                    |                                      | <b> </b> |         |                      |                                  |                                | <u> </u>            |  |
| <u>e</u>  |  |                                    |                                      | <u> </u> |         |                      |                                  |                                | L                   |  |
| (e) Gross sales price   | (f) Depreciation allowed<br>(or allowable)               | plus e                             | st or other basis<br>expense of sale |          |         |                      |                                  | ain or (loss)<br>s (f) minus ( | (g))                |  |
| a 5,526,818.  |  |                                    | 5,084,24                             | 4.       |         |                      |                                  |                                | 442,574.            |  |
| b 38,384.   | ·<br>  |                                    |                                      |          |         |                      |                                  |                                | 38,384.             |  |
| С   |  |                                    |                                      |          |         |                      |                                  |                                |                     |  |
| d   |  |                                    |                                      |          |         |                      |                                  |                                |                     |  |
| <u>e</u>  | L  |                                    |                                      |          |         |                      |                                  |                                |                     |  |
| Complete only for assets showing  | ig gain in column (h) and owned by t                     | the foundation                     | on 12/31/69.                         |          |         | (1)                  | Gains (C                         | Col. (h) gain                  | minus               |  |
| (i) FMV as of 12/31/69  | (j) Adjusted basis                                       |                                    | cess of col. (1)                     |          |         | COI.                 |                                  | not less than<br>(from col. (  |                     |  |
| (1)1 WV as 01 12/3 1/09   | as of 12/31/69   | over                               | col. (j), if any                     |          |         |                      |                                  | (110111 0011 (1                |                     |  |
| <u>a</u>  |  |                                    |                                      |          |         |                      |                                  |                                | 442,574.            |  |
| b   |  |                                    |                                      |          |         |                      |                                  |                                | 38,384.             |  |
| C   |  |                                    |                                      |          |         |                      |                                  |                                |                     |  |
| d   |  |                                    |                                      |          |         |                      |                                  |                                |                     |  |
| е   |  |                                    |                                      |          |         |                      |                                  |                                |                     |  |
| 2 Capital gain net income or (net ca  | pital loss) { If gain, also enter   If (loss), enter -0- | ın Part I, line<br>ın Part I, line | 7<br>7                               | }        | 2       |                      |                                  |                                | 480,958.            |  |
| 3 Net short-term capital gain or (los   | •  |                                    |                                      | 1        |         |                      |                                  |                                |                     |  |
| If gain, also enter in Part I, line 8,  | •  | u (0).                             |                                      | 1        |         |                      |                                  |                                |                     |  |
| If (loss), enter -0- in Part I, line 8  | (5)  |                                    |                                      |          | 3       |                      |                                  | N/A                            |                     |  |
| Part V   Qualification U  | nder Section 4940(e) for                                 | Reduced                            | Tax on Net                           | Inv      | estn    | nent Inc             | ome                              |                                |                     |  |
| (For optional use by domestic private   | foundations subject to the section 4                     | 040(a) tax on                      | net investment in                    | comc     | )       |                      |                                  |                                |                     |  |
|   |  | (-,                                |                                      |          | •       |                      |                                  |                                |                     |  |
| If section 4940(d)(2) applies, leave the  | iis part blank.  |                                    |                                      |          |         |                      |                                  |                                |                     |  |
| Was the foundation liable for the sect  | tion 4942 tax on the distributable am-                   | ount of any ve                     | ear in the base per                  | iod?     |         |                      |                                  |                                | Yes X No            |  |
| If "Yes," the foundation doesn't qualify  |  |                                    | -                                    |          |         |                      |                                  |                                |                     |  |
| 1 Enter the appropriate amount in e   |  |                                    |                                      | ntries.  |         | -                    |                                  |                                |                     |  |
| (a)   | (b)  |                                    |                                      | (c)      |         |                      |                                  | Dietrik                        | (d)<br>oution ratio |  |
| Base periód years<br>Calendar year (or tax year beginnir  | A 4  | tributions                         | Net value of no                      |          | ıtable- | use assets           | 1                                | (col. (b) div                  | rided by col. (c))  |  |
| 2017  | 27   | 7,034.                             |                                      | 6        | 77      | 5,847                |                                  |                                |                     |  |
| 2016  |  | 2,279.                             |                                      |          |         | 6,913                |                                  |                                | .045939             |  |
| 2015  |  | 0,582.                             |                                      |          |         | 5,174                |                                  |                                |                     |  |
| 2014  |  | 3,722.                             |                                      |          |         | 2,610                |                                  |                                |                     |  |
| 2013  |  | 0,980.                             |                                      |          |         | 5,691                |                                  |                                | .048149             |  |
|   |  | 0,000                              |                                      |          |         | <del> </del>         | <del>`</del>                     |                                |                     |  |
| 2 Total of line 1, column (d)   |  |                                    |                                      |          |         |                      | 2                                |                                | .252441             |  |
| 3 Average distribution ratio for the 5  | Sought have beind - divide the lot if a                  | orlina 5 hv 6 í                    | Year houthe arrests                  | ar of v  | Bur.    |                      | <b>-</b> -                       |                                |                     |  |
| the foundation has been in exister  |  | iii iiile 2 by 5 t                 | o, or by the number                  | ci Oi y  | Cai S   |                      | 3                                |                                | .050488             |  |
| are roundation has been in exister  | ice ii iess tiiaii 5 years                               |                                    |                                      |          |         |                      |                                  | -                              | .030400             |  |
| 4 Enter the net value of noncharitab  | la una appara for 2019 from Dort V. I                    | E                                  |                                      |          |         |                      | 4                                | ,                              | 7,087,049.          |  |
| 4 Enter the net value of noncharitao  | ie-use assets for 20 to from Part X, ii                  | ille 5                             |                                      |          |         |                      | -                                | <del></del>                    | 7,007,043.          |  |
| 5 M Dat Land Land   |  |                                    |                                      |          |         |                      | _                                |                                | 257 011             |  |
| 5 Multiply line 4 by line 3   |  |                                    |                                      |          |         |                      | 5                                |                                | 357,811.            |  |
|   |  |                                    |                                      |          |         |                      |                                  |                                | E 702               |  |
| 6 Enter 1% of net investment incom  | e (1% of Part I, line 27b)                               |                                    |                                      |          |         |                      | 6                                |                                | 5,793.              |  |
|   |  |                                    |                                      |          |         |                      |                                  |                                | 262 624             |  |
| 7 Add lines 5 and 6   |  |                                    |                                      |          |         |                      | 7                                | <u> </u>                       | 363,604.            |  |
| 8 Enter qualifying distributions from   | Part VII June 4  |                                    |                                      |          |         |                      | 8                                |                                | 299,386.            |  |
|   | •  | 1h and                             | lata that na-t                       | 0 4 40   | / tan-  | nto                  |                                  |                                |                     |  |
| See the Part VI instructions.   | line 7, check the box in Part VI, line                   | io, and comp                       | nete mat part using                  | ya 17    | o lax r | alt.                 |                                  |                                |                     |  |

Cecile Higginson Murphy

| Form 990-PF (2018) Charitable Foundation  |   | 04 - 344   |   |                   | Page 4        |
|---|---|--|---|-------------------|---------------|
| Part VI Excise Tax Based on Investment Income (Section 494  | 40(a), 4940(b), 4940(e), or 4               | 1948 - see                                       | e instru  | ction             | 1S)           |
| 1a Exempt operating foundations described in section 4940(d)(2), check here ▶ □ and                       | enter "N/A" on line 1.                      |  |   |                   |               |
|   | ecessary-see instructions)                  |  |   |                   |               |
| <b>b</b> Domestic foundations that meet the section 4940(e) requirements in Part V, check here            | <del></del>                                 | 1  | 11  | 1,58              | 87.           |
| of Part I, line 27b   |   |  |   |                   | i             |
| c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4              | 1% of Part I. line 12. col. (b).            |  |   |                   | 1             |
| 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; of              |   | 2  |   |                   | _o_           |
| 3 Add lines 1 and 2   | ,   | 3  | 1.  | 1,58              | 87.           |
| 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   | 5  | 1.1   | 1,58              |               |
| 6 Credits/Payments.   |   | <del>                                     </del> |   | <del></del>       | <del></del> , |
| a 2018 estimated tax payments and 2017 overpayment credited to 2018                                       | 6a   14,800.                                |  |   |                   |               |
| * *   | 6b 0.                                       | 1 1 2  |   |                   | 1             |
| b Exempt foreign organizations - tax withheld at source   | 1   | 1 1.   | •   |                   | 1             |
| c Tax paid with application for extension of time to file (Form 8868)                                     |   | 1  |   |                   | 1             |
| d Backup withholding erroneously withheld   | 6d U.                                       | <del></del> ا                                    |   | 4,80              | لس            |
| 7 Total credits and payments. Add lines 6a through 6d   | 114   | 7  |   | £ , 0 (           | 0.            |
| 8 Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is att                     | tached                                      | 8  |   |                   | <u> </u>      |
| 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed                           |   | 9  | <del>,</del>                                    | <del></del>       | 15            |
| 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid              | 2 212                                       | 10   |   | 3,21              |               |
| 11 Enter the amount of line 10 to be: Credited to 2019 estimated tax                                      | 3,213. Refunded ▶                           | 11   |   |                   | <u>0.</u>     |
| Part VII-A   Statements Regarding Activities  |   |  |   |                   |               |
| 1a During the tax year, did the foundation attempt to influence any national, state, or local legi        | islation or did it participate or intervene | . In   |   | Yes               | No            |
| any political campaign?   |   |  | 1a  |                   | Х             |
| <b>b</b> Did it spend more than \$100 during the year (either directly or indirectly) for political purpo | oses? See the instructions for the defin    | ition  | 1b  |                   | X             |
| If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies            | of any materials published or               |  |   |                   | 1             |
| distributed by the foundation in connection with the activities.  |   |  |   |                   | ]             |
| c Did the foundation file Form 1120-POL for this year?  |   |  | 1c  |                   | X             |
| d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during th             |   |  |   |                   |               |
| (1) On the foundation. ▶ \$ 0 • (2) On foundation manager   | rs. ▶ \$ 0 •                                |  |   |                   | Į             |
| e Enter the reimbursement (if any) paid by the foundation during the year for political expend            | diture tax imposed on foundation            | •  | 1 1   |                   | !             |
| managers. ▶ \$ 0.   |   |  |   |                   | Ì             |
| 2 Has the foundation engaged in any activities that have not previously been reported to the              | IRS?  |  | 2   |                   | X             |
| If "Yes," attach a detailed description of the activities.  |   |  |   | $\neg \uparrow$   | $\overline{}$ |
| 3 Has the foundation made any changes, not previously reported to the IRS, in its governing               | instrument, articles of incorporation,      | )r   |   |                   | j             |
| bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes                    | , - ,                                       |  | 3   |                   | X             |
| 4a Did the foundation have unrelated business gross income of \$1,000 or more during the ye               | ear?  |  | 4a  | 一                 | X             |
| b If "Yes," has it filed a tax return on Form 990-T for this year?  |   | N/A  | 4b  |                   |               |
| 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year           | ·?  |  | 5   | $\neg \uparrow$   | X             |
| If "Yes," attach the statement required by General Instruction T  | · •   |  | <del> </del>                                    |                   |               |
| 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied 6             | either                                      |  |   | ·                 | ł             |
| By language in the governing instrument, or   |   |  |   |                   | 4             |
| By state legislation that effectively amends the governing instrument so that no mandato                  | ary directions that conflict with the etate | ı law  |   |                   | .             |
| remain in the governing instrument?   | by angenous mar commet with the state       | , 1444   | 6   | X                 |               |
| 7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," com           | oplete Part II ent (c) and Part VV          |  | 7   | X                 |               |
| 7 Did the loundation have at least \$5,000 in assets at any time during the year? If tes, com             | ipiete Part II, coi. (c), and Part Av       |  | <del>'                                   </del> | <del>^</del> +    | <del></del> , |
| 6. Falsation states to the foundation are also when the day are about the                                 |   |  |   |                   |               |
| 8a Enter the states to which the foundation reports or with which it is registered. See instructi         | ions.                                       |  | -   |                   | - 1           |
| MA  | Attaches Canadal (as describe)              | <del></del>                                      | -   | - 1               | į             |
| 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)             |  | <del></del>  -                                  | <del>-,-</del>  . | لــــ         |
| of each state as required by General Instruction G? If "No," attach explanation                           |   |  | 8b  | Х                 | <del></del> , |
| 9 Is the foundation claiming status as a private operating foundation within the meaning of s             |   | ndar   |   |                   | لــــِــا     |
| year 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If "Yes," cor             |   |  | 9   |                   | X             |
| 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a sched          | dule listing their names and addresses      |  | 10  | <u>_</u> _        | X             |
|   |   | 1  | Form <b>990</b> -                               | -PF (             | 2018)         |

| P  | 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             | L        | 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             |          | X                       |
| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application?  | 13             | X        |                         |
|    | Website address ► N/A  |                |          |                         |
| 14 | The books are in care of ▶ Choate Hall & Stewart Telephone no. ▶ (617)   | 248            | -47      | 60                      |
|    | Located at ▶ Two International Place, Boston, MA ZIP+4 ▶0  | 2110           | -        |                         |
| 15 | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here  |                | <u> </u> | $ldsymbol{\Box}$        |
|    | and enter the amount of tax-exempt interest received or accrued during the year  | 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,   |                | Yes      | No                      |
|    | 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   |                | $\vdash$ |                         |
|    | foreign country  |                | ,        |                         |
| Pa | art 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                      |
| 18 | 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?   |                |          |                         |
|    | (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)  |                |          | l                       |
|    | a disqualified person?   |                |          |                         |
|    | (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  X Yes No   |                |          |                         |
|    | (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  X Yes No   |                | [        |                         |
|    | (5) Transfer any income or assets to a disqualified person (or make any of either available  |                |          | _                       |
|    | for the benefit or use of a disqualified person)?  |                |          | ٠.                      |
|    | (6) Agree to pay money or property to a government official? (Exception. Check "No"  |                |          |                         |
|    | if the foundation agreed to make a grant to or to employ the official for a period after   |                | .        |                         |
|    | termination of government service, if terminating within 90 days.)  Yes X No   | }              | ١. ١     |                         |
|    | If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations   |                |          | ĺ                       |
|    | section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions  | 1b             |          | $\overline{\mathbf{x}}$ |
|    | Organizations relying on a current notice regarding disaster assistance, check here  |                | $\vdash$ | <del></del> -           |
| ,  | Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected  |                |          | ĺ                       |
|    | before the first day of the tax year beginning in 2018?  | 10             |          | X                       |
| 2  | Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation   | '-             | $\vdash$ | <del></del>             |
| _  | defined in section 4942(1)(3) or 4942(1)(5)).  |                | ;        |                         |
|    | 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   |                | '        |                         |
| •  |  |                |          |                         |
|    | ——————————————————————————————————————   |                |          |                         |
|    | If "Yes," list the years , , , , , , , , , , , , , , , , , , ,   |                |          | ١.                      |
| ٠  | Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect  |                |          | ł                       |
|    | 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   |                |          | <del></del> -           |
|    | ·  | 2b             | $\vdash$ |                         |
| ·  | If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here  | '              | •        | ·                       |
|    | Did the foundation is 11 and the 200 days to the total and the state of the state o | !              |          |                         |
| 38 | Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?  Yes X No   |                |          |                         |
|    |  | 1 !            |          |                         |
|    | 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                       |
|    | 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   |                |          | l                       |
|    | 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,   | - <u>-</u>     |          |                         |
|    | Form 4720, to determine if the foundation had excess business holdings in 2018.)  N/A  | 35             | <b> </b> | 17                      |
|    | Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  | 4a             | igwdown  | X.                      |
| 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>       |          |                         |
|    | had not been removed from jeopardy before the first day of the tax year beginning in 2018?   | 4b             | ل        | X                       |
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| Part VII-B   Statements Regarding Activities for Which I   | orm 4/20 May Be F                                | required (contin                  | ued)   |                              |  |
|--|--|-----------------------------------|--|------------------------------|--|
| 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))?  | Y                                 | es 🗶 No  |                              |  |
| (2) Influence the outcome of any specific public election (see section 4955); o                      | r to carry on, directly or indire                |                                   |  |                              | {  |
| any voter registration drive?  |  |                                   | es X No  |                              | 1 1  |
| (3) Provide a grant to an individual for travel, study, or other similar purposes                    | ?  | Y <sub>0</sub>                    | es X No  |                              |  |
| (4) Provide a grant to an organization other than a charitable, etc., organization                   | n described in section                           |                                   |  |                              | li   |
| 4945(d)(4)(A)? See instructions  |  | Y                                 | es X No  | ,                            |  |
| (5) Provide for any purpose other than religious, charitable, scientific, literary,                  | or educational purposes, or f                    |                                   |  |                              | ,  |
| the prevention of cruelty to children or animals?  |  |                                   | es X No  |                              | 1 1  |
| <b>b</b> If any answer is "Yes" to 5a(1)-(5), did <b>any</b> of the transactions fail to qualify und |  | n Regulations                     |  | <del></del>                  |  |
| section 53.4945 or in a current notice regarding disaster assistance? See instru                     |  |                                   | N/A  | 5b                           | <del> </del> _                                   |
| Organizations relying on a current notice regarding disaster assistance, check h                     |  |                                   |  |                              |  |
| c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fr                   |  |                                   |  |                              | 1  |
| expenditure responsibility for the grant?  | N  | [/A                               | es L No  | -                            |  |
| If "Yes," attach the statement required by Regulations section 53.4945-5(d).                         |  |                                   |  |                              | 1 1  |
| 6a Did the foundation, during the year, receive any funds, directly or indirectly, to                | pay premiums on                                  |                                   | <b>□</b>   |                              |  |
| a personal benefit contract?   |  | Y(                                | es 🗶 No 📙  | <u></u>                      |  |
| <b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a p           | ersonal benefit contract?                        |                                   | į.   | 6b                           | X  |
| If "Yes" to 6b, file Form 8870.  |  |                                   | es X No  | •                            | 1. 1   |
| 7a At any time during the tax year, was the foundation a party to a prohibited tax 3                 |  | Y(                                |  | 71                           | <del>                                     </del> |
| b If "Yes," did the foundation receive any proceeds or have any net income attribu                   |  | _                                 | N/A  | 7b                           | <del>                                     </del> |
| 8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$                    | 1,000,000 in remuneration of                     |                                   | es X No  | ·   :                        | 1 -1   |
| excess parachute payment(s) during the year?  Part VIII Information About Officers, Directors, Trust | Foundation Mo                                    |                                   |  | í                            | <del></del> '                                    |
| Part VIII Information About Officers, Directors, Trust Paid Employees, and Contractors               | ees, roundation Ma                               | nagers, mgm                       | ,<br>  |                              |  |
| 1 List all officers, directors, trustees, and foundation managers and t                              | heir compensation.                               |                                   |  |                              |  |
| (-) Name and address   | (b) Title, and average<br>hours per week devoted | (c) Compensation<br>(If not paid, | (d) Contributions to<br>employee benefit plans<br>and deferred | (e) Exp<br>account           | ense<br>Lother                                   |
| (a) Name and address   | to position                                      | enter -0-)                        | compensation   | allowa                       | ínces  |
|  | Trustee  |                                   |  |                              |  |
| Choate Hall & Stewart LLP Two Int'l  |  |                                   |  |                              | _  |
| Boston, MA 02110   | 1.00   | 0.                                | 0.   |                              | 0.   |
|  | Trustee  |                                   |  |                              |  |
| Choate Hall & Stewart LLP Two Int'l  | 4 00   |                                   | _  |                              | •  |
| Boston, MA 02110   | 1.00   | 0.                                | 0.   |                              | 0.   |
|  | Trustee  |                                   |  |                              | _  |
| Choate Hall & Stewart LLP Two Int'l  | 1 00   |                                   | _  |                              | ^  |
| Boston, MA 02110   | 1.00   | 0.                                | 0.   |                              | <u>0.</u>  |
|  |  |                                   |  |                              |  |
|  |  |                                   |  |                              |  |
| 2 Compensation of five highest-paid employees (other than those inc                                  | luded on line 1) If none                         | enter "NONE "                     |  | <u> </u>                     |  |
|  | (b) Title, and average                           | enter NONE.                       | (d) Contributions to   | (e) Ext                      | pense  |
| (a) Name and address of each employee paid more than \$50,000  | hours per week devoted to position               | (c) Compensation                  | (d) Contributions to<br>employee benefit plans<br>and deferred | (e) Exp<br>account<br>allowa | , other  |
| NONE   | devoted to position                              |                                   | compensation   | anowa                        |  |
| NONE   |  |                                   |  |                              |  |
|  |  |                                   |  |                              |  |
|  |  |                                   |  |                              |  |
|  |  | <del> </del>                      | <u></u>  |                              |  |
|  |  |                                   |  |                              |  |
|  |  |                                   |  |                              |  |
|  |  |                                   |  |                              |  |
|  | -  |                                   |  |                              |  |
|  |  |                                   |  |                              |  |
| Total number of other employees paid over \$50,000   |  |                                   | <u> </u>   |                              | 0  |
|  |  |                                   | Form   | 990-PF                       | (2018)   |
|  |  |                                   |  |                              | ,  |

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| Paid Employees, and Contractors (continued)   | tion Managers, Highly |                          |
|---|-----------------------|--------------------------|
| 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         |
| Choate Hall & Stewart   | Investment            |                          |
| Two International Place, Boston, MA 02110   | Management, Tax Pre   | p 69,465.                |
|   |                       |                          |
|   |                       |                          |
| Part IX-A Summary of Direct Charitable Activities   | <u> </u>              | <u> </u>                 |
| List the foundation's four largest direct charitable activities during the tax year. Include relevant statist number of organizations and other beneficiaries served, conferences convened, research papers produced. |                       | Expenses                 |
| 1 N/A   |                       |                          |
|   |                       | 2                        |
| 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 I  | lines 1 and 2         | Amount                   |
| 1 N/A   | 1 410 2.              | Anount                   |
|   |                       |                          |
| 2   |                       |                          |
|   |                       |                          |
| All other program-related investments. See instructions.  |                       |                          |
|   |                       |                          |
|   |                       |                          |
|   |                       |                          |
| Total. Add lines 1 through 3  | <b>•</b>              | 0.                       |
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| P             | art X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations   | ndations,    | see instructions) |
|---------------|--|--------------|-------------------|
| $\overline{}$ | Fall market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes.  | 76.5         |                   |
| а             | Average monthly fair market value of securities  | 1a           | 6,830,135.        |
|               | Average of monthly cash balances   | 1b           | 331,847.          |
|               | Fair market value of all other assets  | 10           | 32,992.           |
| d             | Total (add lines 1a, b, and c)   | 1d           | 7,194,974.        |
|               | Reduction claimed for blockage or other factors reported on lines 1a and   | · .;         |                   |
|               | 1c (attach detailed explanation) 1e 0.   | k _          |                   |
| 2             | Acquisition indebtedness applicable to line 1 assets   | 2            | 0.                |
| 3             | Subtract line 2 from line 1d   | 3            | 7,194,974.        |
| 4             | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)  | 4            | 107,925.          |
| 5             | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4   | 5            | 7,087,049.        |
| 6             | Minimum investment return. Enter 5% of line 5  | 6            | 354,352.          |
| P             | art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations, check here  and do not complete this part.) | d certain    |                   |
| 1             | Minimum investment return from Part X, line 6  | 1            | 354,352.          |
| 2a            | Tax on investment income for 2018 from Part VI, line 5 2a 2a 11,587.   |              |                   |
| ь             | Income tax for 2018. (This does not include the tax from Part VI.)   | ŀ            |                   |
| c             | Add lines 2a and 2b  | 2c           | 11,587.           |
| 3             | Distributable amount before adjustments. Subtract line 2c from line 1  | 3            | 342,765.          |
| 4             | Recoveries of amounts treated as qualifying distributions  | 4            | 0.                |
| 5             | Add lines 3 and 4  | 5            | 342,765.          |
| 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            | 342,765.          |
| <u>P</u>      | art XII Qualifying Distributions (see instructions)  |              |                   |
| 1             | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:   | <u> </u>     | 222               |
| а             | Expenses, contributions, gifts, etc - total from Part I, column (d), line 26   | 1a           | 299,386.<br>0.    |
| b             | Program-related investments - total from Part IX-B   | 1b           | <u> </u>          |
| 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:   | ,            |                   |
| а             | 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            | 299,386.          |
| 5             | Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment   |              | _                 |
|               | income. Enter 1% of Part I, line 27b   | 5            | 0.                |
| 6             | Adjusted qualifying distributions Subtract line 5 from line 4  | 6            | 299,386.          |
|               | Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation (   | qualifies fo | r the section     |

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Part XIII Undistributed Income (see instructions)

|   | (a)<br>Corpus | (b)<br>Years prior to 2017            | (c)<br>2017 | (d)<br>2018   |
|---|---------------|---------------------------------------|-------------|---------------|
| 1 Distributable amount for 2018 from Part XI,                                       |               |                                       |             | 342,765.      |
| 2 Undistributed income, if any, as of the end of 2018                               | ···           |                                       |             |               |
| a Enter amount for 2017 only  |               |                                       | 120,799.    |               |
| b Total for prior years   |               | · · · · · · · · · · · · · · · · · · · |             |               |
| b rotal for prior yours   |               | 0.                                    |             | ļ ,           |
| 3 Excess distributions carryover, if any, to 2018.                                  |               |                                       |             |               |
| a From 2013   |               |                                       |             |               |
| b From 2014   | İ             |                                       |             | ,             |
| c From 2015   |               |                                       |             | ·             |
| dFrom 2016  |               |                                       |             |               |
| e From 2017   |               |                                       |             |               |
| f Total of lines 3a through e   | 0.            |                                       |             |               |
| 4 Qualifying distributions for 2018 from  |               |                                       |             | <del></del> i |
| Part XII, line 4. ►\$ 299, 386.   |               |                                       |             |               |
| a Applied to 2017, but not more than line 2a  |               |                                       | 120,799.    |               |
| b Applied to undistributed income of prior  |               |                                       |             |               |
| years (Election required - see instructions)  |               | 0.                                    |             | I             |
| c Treated as distributions out of corpus  |               |                                       | <del></del> |               |
| (Election required - see instructions)  | 0.            |                                       |             |               |
| d Applied to 2018 distributable amount  |               |                                       |             | 178,587.      |
| e Remaining amount distributed out of corpus  | 0.            |                                       | ·           |               |
| 5 Excess distributions carryover applied to 2018                                    | 0.            |                                       | · <u>-</u>  | 0.            |
| (If an amount appears in column (d), the same amount must be shown in column (a) )  |               |                                       |             |               |
| 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'<br>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.                                    |             | į             |
| 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  |               |                                       |             | 164,178.      |
| 7 Amounts treated as distributions out of   |               |                                       |             | j             |
| 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.            |                                       | <del></del> |               |
| 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 F   | Die Foundations            |  | II.A question O                                  | N / N  | 4/39/ Page 10    |
|--|----------------------------|--|--|--|------------------|
| 1 a If the foundation has received a ruling of   |                            |  |  | N/A  | <del></del>      |
|  |                            |  |  |  |                  |
| foundation, and the ruling is effective for  | •                          | -  | un costion                                       | 4942(j)(3) or 494                                | 42(1)(5)         |
| b Check box to indicate whether the found  | Tax year                   | T  | Prior 3 years                                    | 4942(])(3) 01 494                                | 42(j)(5)         |
| 2 a Enter the lesser of the adjusted net   | (a) 2018                   | (b) 2017   | (c) 2016   | (d) 2015   | (e) Total        |
| income from Part I or the minimum  | (4)2010                    | (8)2017  | (0) 20 10  | (0)2010  |                  |
| investment return from Part X for  |                            |  |  |  |                  |
| each year listed   |                            | <del>                                     </del> | <del></del>                                      | 1  |                  |
| b 85% of line 2a   | <del></del> -              |  | <del> </del>                                     | <del> </del>                                     |                  |
| c Qualifying distributions from Part XII,  |                            |  |  |  |                  |
| line 4 for each year listed  d Amounts included in line 2c not   |                            |  | <del>                                     </del> | <del>                                     </del> |                  |
| used directly for active conduct of  |                            | 1  |  | 1  |                  |
| exempt activities  |                            |  |  |  |                  |
| e Qualifying distributions made directly   | <del></del>                |  | <del> </del>                                     | <del> </del>                                     | <del></del>      |
| for active conduct of exempt activities.   |                            | 1  |  |  |                  |
| 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)  |                            |  | <u> </u>   |  |                  |
| b "Endowment" alternative test - enter<br>2/3 of minimum investment return   |                            |  |  |  |                  |
| shown in Part X, line 6 for each year<br>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   |                            |  | <del> </del>                                     |  |                  |
| (4) Gross investment income  Part XV   Supplementary Information   | mation (Comple             | to this port only                                | if the foundation                                | had \$5 000 ar ma                                | ro in coooto     |
| Part XV Supplementary Information at any time during the supplementary Information and Information a |                            |  | ir the foundation                                | nad \$5,000 or mo                                | re in assets     |
| 1 Information Regarding Foundation   | <del>`</del>               |  |  | <del></del>                                      |                  |
| a List any managers of the foundation who  | _                          | than 2% of the total con                         | tributions received by the                       | foundation before the close                      | e of any tax     |
| year (but only if they have contributed m  |                            |  | and and and and and and                          |  | or any tan       |
| Cecile Higginson Mury  | phy                        |  |  |  |                  |
| b List any managers of the foundation who  | own 10% or more of th      | e stock of a corporation                         | (or an equally large portion                     | on of the ownership of a pai                     | rtnership or     |
| other entity) of which the foundation has  | a 10% or greater interes   | st.  |  |  |                  |
| None   |                            |  |  |  |                  |
| 2 Information Regarding Contribution   |                            |  |  |  |                  |
| Check here $ ightharpoonupigl(X)$ if the foundation or   |                            |  |  |  | sts for funds If |
| the foundation makes gifts, grants, etc.,  | to individuals or organiza | ations under other condi                         | tions, complete items 2a,                        | b, c, and d.                                     |                  |
| а The пате, address, and telephone numb  | er or email address of th  | ne person to whom appli                          | cations should be addres:                        | sed:   |                  |
| N/A  |                            |  |  |  |                  |
|  | <del>-</del>               | <del></del>                                      | <del></del>                                      |  |                  |
| b The form in which applications should be   | submitted and informat     | tion and materials they s                        | hould include:                                   |  |                  |
| N/A  |                            | _ <del></del>                                    |  | · <del></del> -                                  |                  |
| c Any submission deadlines; N/A  |                            |  |  |  |                  |
| d Any restrictions or limitations on awards  | such as hy geographics     | al areas charitable fields                       | kinds of institutions or a                       | other factors:                                   |                  |
| N/A  | , sacii as by geograpilica | ii arcas, charnault litlus                       | , minus or mistitutions, Of C                    | mior raciol <b>s.</b>                            |                  |
|  |                            |  |  |  |                  |

| 3 Grants and Contributions Paid During t          | he Year or Approved for Future   | Payment              |                                  |                     |
|---|--|----------------------|----------------------------------|---------------------|
| Recipient   | If recipient is an individual,<br>show any relationship to<br>any foundation manager | Foundation status of | Purpose of grant or contribution | Amount              |
| Name and address (home or business)               | or substantial contributor   | recipient            |                                  |                     |
| a Paid during the year                            |  |                      |                                  |                     |
| Abington Public Schools                           | N/A  | PC                   | General Purpose                  |                     |
| 171 Adams Street                                  |  |                      |                                  |                     |
| Abington, MA 02351                                |  |                      |                                  | 5,00                |
|   |  |                      |                                  |                     |
| Appalachian Mountain Club                         | N/A  | PC                   | Outdoors RX Program              |                     |
| 10 City Square                                    |  | ľ                    |                                  |                     |
| Boston, MA 02129                                  |  |                      | -                                | 10,00               |
|   |  |                      |                                  |                     |
| Autism Research Foundation                        | N/A  | PC                   | General Purpose                  |                     |
| 72 E. Concord Street, # R1014<br>Boston, MA 02118 |  |                      |                                  | 20.00               |
| BOSCON, MA 02110                                  |  |                      |                                  | 20,00               |
|   |  |                      |                                  |                     |
| The Book Truck<br>14525 Weddington Street         | N/A  | PC                   | General Purpose                  |                     |
| Sherman Oaks, CA 91411                            |  |                      |                                  | 20,00               |
|   |  |                      |                                  |                     |
| Boston Symphony Orchestra                         | N/A  | PC                   | Boston Pops - Annual             |                     |
| 301 Mass Avenue                                   | N/A  | "                    | Fund                             |                     |
| Boston, MA 02115-4557                             |  |                      |                                  | 35,00               |
|   | continuation shee  | t(s)                 | <b>▶</b> 3a                      | 280,00              |
| b Approved for future payment                     |  |                      |                                  |                     |
| None  |  |                      |                                  |                     |
|   |  |                      |                                  |                     |
|   | 11   |                      |                                  |                     |
|   |  |                      |                                  |                     |
|   |  |                      |                                  |                     |
|   |  |                      | -                                |                     |
|   |  |                      |                                  |                     |
|   |  |                      |                                  |                     |
| Total   |  | <u> </u>             | <b>▶</b> 3b                      |                     |
|   | <del></del>  |                      |                                  | m <b>990-PF</b> (20 |

| Enter gross amounts unless otherwise indicated.             | Unrelated bus                                    | iness income                           |  | y section 512, 513, or 514 | (e)                                   |
|---|--|--|--|----------------------------|---------------------------------------|
| 1 Program service revenue.                                  | (a)<br>Business<br>code                          | (b)<br>Amount                          | (C)<br>Exclu-<br>sion<br>code                    | (d)<br>Amount              | Related or exempt function income     |
| a   |  |  | 1 -  |                            | <del></del>                           |
| b   |  |  | 1  |                            |                                       |
| C   |  |  | <del>                                     </del> |                            |                                       |
| d   |  | <del>.</del>                           |  |                            |                                       |
| e   |  |  |  |                            |                                       |
| 1   |  |  |  |                            |                                       |
| g Fees and contracts from government agencies               |  |  |  |                            | <del></del>                           |
| 2 Membership dues and assessments                           |  | -4                                     |  |                            | **                                    |
| Interest on savings and temporary cash                      |  |  |  |                            | · · · · · · · · · · · · · · · · · · · |
| investments   |  |  | 14   | 7,246.                     |                                       |
| Dividends and interest from securities                      |  |  | 14   | 7,246.                     |                                       |
| 5 Net rental income or (loss) from real estate:             |  |  |  | <del></del>                |                                       |
| a Debt-financed property                                    |  |  | 11-  | <del></del>                |                                       |
| b Not debt-financed property                                |  |  |  |                            |                                       |
| 6 Net rental income or (loss) from personal                 |  |  | <del>                                     </del> |                            |                                       |
| property  |  |  |  | 1                          |                                       |
| 7 Other investment income                                   |  |  | +  | <del>-</del>               |                                       |
| B Gain or (loss) from sales of assets other                 |  | <del></del>                            | 1  |                            | <del></del>                           |
| than inventory  |  |  | 18   | 480,958.                   |                                       |
| 9 Net income or (loss) from special events                  |  |  | +  |                            |                                       |
| O Gross profit or (loss) from sales of inventory            |  | <del></del>                            | <del>                                     </del> | <del></del> +              |                                       |
| 1 Other revenue:  | <del>                                     </del> |  | <del>                                     </del> | <del></del>                |                                       |
| a Passthrough Income  | 523000   | <140.                                  |  | <1,776.                    |                                       |
| b   | _ 523000   | 7110.                                  | <del>'</del>                                     | ~~~                        |                                       |
| c   | <del>    </del>                                  |  | +  |                            | <del></del>                           |
| d   |  |  | <del>                                     </del> |                            | ·····                                 |
| e   | <del></del>                                      | <del></del>                            | +  |                            |                                       |
| 2 Subtotal. Add columns (b), (d), and (e)                   |  | <140.                                  | <del></del>                                      | 635,771.                   |                                       |
| 3 Total. Add line 12, columns (b), (d), and (e)             |  | <u> </u>                               | ·  | 13                         | 635,631                               |
| See worksheet in line 13 instructions to verify calculation | ic )   |  |  | ···                        | 033,033                               |
|   |  |  |  |                            | · <del></del>                         |
| Part XVI-B Relationship of Activitie                        | es to the Accomp                                 | ishment of E                           | xempt P  | ırposes                    |                                       |
| Line No. Explain below how each activity for which          | income is reported in colu                       | mn (e) of Part XVI-A                   | A contributed                                    | importantly to the accomp  | dishment of                           |
| the foundation's exempt purposes (other                     |  |  |  |                            |                                       |
|   |  | <u> </u>                               |  |                            |                                       |
|   |  |  |  |                            |                                       |
|   |  |  |  | ·                          |                                       |
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|   | <del></del>                                      |  |  |                            |                                       |
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|   | <del></del>                                      | ······································ |  |                            |                                       |
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|   |  |  |  |                            |                                       |
|   |  |  |  |                            |                                       |
|   |  |  |  |                            |                                       |

|  | Part XVII      |   |                          |                 |                                  | and Relations                                    | hips With Noncha                                 |                          |                          | aye 13    |
|--|----------------|---|--------------------------|-----------------|----------------------------------|--|--|--------------------------|--------------------------|-----------|
| a Transfers from the reporting foundation to a noncharitable exempt organization of:  (1) Cash (2) Other assets (3) Other transactions: (1) Sales of assets to a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rental of facilities, equipment, or other assets (4) Remidurement arrangements (5) Loans or found quarantes (6) Performance of services or membership or fundrasing solicitations (6) Performance of services or membership or fundrasing solicitations (7) If the answer to any of the above is "Yes," complete the following chridule. Column (b) should always show the fair market value of the goods, other assets, or services queen by the reporting foundation. If the fundation received less than fair market value in any other analysis of the above is "Yes," complete the following chridule. Column (b) should always show the fair market value of the goods, other assets, or services queen by the reporting foundation. If the fundation directly or more tax-exempt organization or sharing arrangement, show in column (b) the value of the goods, other assets, or services received.  (a) Live no (b) Amburit involved (c) Name of noncharitable exempt organization (d) Description of transfers, transactions, and sharing arrangements.  Sign I Press, complete the following schedule.  (a) Live remarkes of program alone program and the return, including accompanying schedules and subtrained in a discinsivation of the asset of any including the secondary of the secondary of the asset of any including the secondary of the secondary of the goods, other assets, or secondary of the second | 1 Did the o    | organization directly or indi           | rectly engage in any     | of the follows  | ng with any other organiza       | ation described in sec                           | tion 501(c)                                      | $\neg$                   | Yes                      | No        |
| (2) Other assets b Other ransactions: (1) Sales of assets to a moncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rental of facilities, equipment, or other assets (4) Remburgance of services from a moncharitable exempt organization (5) Loans or loan guarantees (6) Loans or loan guarantees (6) Performance of services or membership or fundrasing solicitations c Sharing of facilities, equipment, mailing lists, other assets, or paid employees c Sharing of facilities, equipment, mailing lists, other assets, or paid employees or services given by the reporting foundation. If the foundation received lies than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services given by the reporting foundation. If the foundation decreated lies than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services given by the reporting foundation. If the foundation decreated lies 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 rei  (b) Amborit involved  (c) Name of noncharitable exempt organization  (d) Description of relationship  (d) Description of relationship  N/A  (d) Description of relationship  (e) Description of relationship  N/A  (e) Description of relationship  (g) Description of relationship  Printy in the following activities of the following activities of an elementary line of an elementary line of any knowledge activities of an elementary line of any knowledge activities of the decrease of any knowledge activities of any kn | (other th      | an section 501(c)(3) organ              | nizations) or in section | on 527, relatin | g to political organization:     | s?   |  |                          |                          |           |
| 2a   Is the foundation directly or indirectly afficiend with, or robited to, one or more tax-exempt organization   1a/2   X   1b/2   X   1b/    | a Transfer     | s from the reporting found              | ation to a noncharita    | able exempt or  | ganization of:                   |  |  | _                        | _                        |           |
| b Other transactions:  (1) Sales of assets to a nonchartable exempt organization  (2) Purchases of assets from a nonchartable exempt organization  (3) Rental of facilities, equipment, or other assets  (4) Rembursement arrangements  (5) Loans or foan quarantees  (6) Performance of services or membership or fundrasing solicitations  (6) Performance of services or membership or fundrasing solicitations  (7) 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 received.  (8) Live in the solicities, equipment, making lists, other assets, or services received.  (9) Amount involved  (1) Marie of organization  (1) Amount involved  (1) Marie of organization  (2) Live in the following schedule  (3) Amount involved  (4) Amount involved  (5) Amount involved  (6) Amount involved  (7) Marie of organization  (8) Type of organization  (9) Type of organization  (9) Description of relationship  (1) Type of organization  (1) Type of organization  (1) Type of organization  (2) Description of relationship  (3) Type of organization  (4) Description of relationship  (6) Description of relationship  (7) Privity represents the relief of privity represents a same the relian, rounding accompanying privitions are allebered, and to be bed of my involving a same privity relationship of privity represents as any strondergo privity relationship of privity represents as any strondergo privity represents a privity st  | (1) Casi       | h                                       |                          |                 |                                  |  |  | 1a(1)                    | <u>/</u>                 |           |
| (1) Sales of assets to an anotharbable exempt organization (2) Purchases of assets from a noncharbable exempt organization (3) Rental of facilities, equipment, or other assets (4) Rembursement arrangements (5) Loans or foran quarantees (6) Performance of services or membership or fundrasing solicitations (6) Performance of services or membership or fundrasing solicitations (7) Performance of services or membership or fundrasing solicitations (8) Performance of services or membership or fundrasing solicitations (9) Performance of services or membership or fundrasing solicitations (15) Loans or foranguarantees (15) Loans or foranguarantees, sequence of the following schedule. Column (8) should always show the fair market value of the goods, other assets, or paid employes (16) If the answer to any of the above is "res," complete the following schedule sex than fair market value in any transaction or sharing arrangement, show in column (19) the value of the goods, other assets, or paid employes (18) Amount involved (19) Amoun  | (2) Othe       | er assets                               |                          |                 |                                  |  |  | 1a(2)                    |                          | X         |
| (2) Purchasso of assets from a noncharable exempt organization  (3) Rential of facilities, equipment, or other assets  (4) Reimbursement arrangements  (5) Loans or foan quarantes  (6) Performance of services or membership or fundrations  (7) Particulations  (8) Performance of services or membership or fundrations  (8) Performance of services or membership or fundrations  (8) Performance of services or membership or fundrations  (9) If the answer to any of the above 5 verg. (complete the following schedule. Column (a)) should always show the fair market value of the goods, other assets, or services received.  (9) Amount involved  (10) Amount involved    | b Other tra    | nsactions:                              |                          |                 |                                  |  |  |                          | -                        | l         |
| (3) Rental of facilities, equipment, or other assets (4) Rembursement arrangements (5) Loans or foan quarantees (6) Performance of services or membership or fundrasing solicitations (7) Enabled scale services or membership or fundrasing solicitations (8) Performance of services or membership or fundrasing solicitations (8) Endough 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 forceved.  (8) Loans or services given by the reporting foundation. (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.  (8) Amount involved (9) Name of noncharitable exempt organization (6) Description of transfers, transactions, and sharing wrangements  N/A  11 Yes  2 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?  3 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?  3 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?  3 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?  4 is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c)(3) or in section 527?  5 is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c)(3) or in section 527?  5 is the foundation directly or indirectly affiliated with, or related to, one or m  |                |   | • •                      |                 |                                  |  |  |                          | _                        |           |
| (3) Loans or foan guarantees (5) Loans or foan guarantees (6) Performance of services or membership or fundrasing solicitations (7) Loans or foan guarantees (8) Performance of services or membership or fundrasing solicitations (8) Performance of services or sequence of the speeds, or services greater to any of the above es "Yes" complete the following schedule. Column (8) should always show the fair market value of the goods, other assets, or services received.  (a) If the answer to any of the above es "Yes" complete the following schedule.  (b) Amount involved (c) Warne of noncharitable exempt organization (d) Description of variations, and sharing arrangements.  N/A  (a) Less no (b) Amount involved (c) Warne of noncharitable exempt organization (d) Description of variations, and sharing arrangements.  N/A  (a) Less no (b) Amount involved (c) Warne of noncharitable exempt organization described in section 501(c) (other than section 501(c)(3)) or in section 527?  b) If Yes, 'complete the following schedule (a) Name of organization (b) Type of organization (c) Description of relationship  N/A  (a) Under penalties of person-legicles graphing exemptions becomes for the section of preparet income that sequency is based on all information of which process has any knowledge in the low of the section becomes any formation becomes become legical by the section becomes legical by the section become legical by the section becomes legical by t  |                |   | ·                        | organization    |                                  |  |  |                          | _                        |           |
| (5) Loans or loan guarantees (6) Performance of services or membership or fundrasing solicitations (7) Experience of services or membership or fundrasing solicitations (8) Performance of services or membership or fundrasing solicitations (8) It as answer to any of the above is Yes, Complete the following schedule. Column (8) should always show the fair market value of the goods, other assets, or services received.  (a) Line no (b) Amount involved (c) Name of nonchariable exempt organization (d) Description of virialization, and sharing arrangement, show in column (9) the value of the goods, other assets, or services received.  (a) Line no (b) Amount involved (c) Name of nonchariable exempt organization (d) Description of virialization, and sharing arrangements  N/A  10 Performance (d) Description of virialization, and sharing arrangements  N/A  11 Yes  Yes No  11 Yes  Yes No  12 Is the foundation directly or indirectly affiliated with, or rolated to, one or more tax-exempt organizations described in section 50 f(c) (other than section 50 f(c)(3)) or in section 527?  If Yes No  11 Yes  Yes No  12 Is the foundation directly or indirectly affiliated with, or rolated to, one or more tax-exempt organizations described in section 50 f(c) (other than section 50 f(c)(3)) or in section 527?  If Yes No  12 Is the foundation directly or indirectly affiliated with, or rolated to, one or more tax-exempt organizations described in section 50 f(c) (other than section 50 f(c)(3)) or in section 527?  Yes No  13 In Yes No  14 Yes No  15 In  |                |   |                          |                 |                                  |  |  | <u> </u>                 | +                        |           |
| (8) Performance of services or membership or fundrasing solicitations  c Sharing of facilities, equipment, mailing lists, other assets, or paid employees  d If the answer to any of the aboves "Ves," complete the following schedule. Column (i) should always show the fair market value of the goods, other assets, or services represented.  (a) Line no (b) Amount involved (c) Name of noncharitable exempt organization.  (b) Amount involved (c) Name of noncharitable exempt organizations (d) Cescretion of transfers, transactions, and always arrangements.  N/A  12 Is the foundation directly or indirectly affiliated with, or rolated to, one or more tax-exempt organizations described in section 50 ft(c) (d) the range execution of transfers, transactions, and always arrangements.  N/A  13 Is the foundation directly or indirectly affiliated with, or rolated to, one or more tax-exempt organizations described in section 50 ft(c) (d) for insection 527?  b If "Yes," complete the following schedule  (a) Name of organization (b) Type of organization (c) Description of relationship  N/A  Sign and defet, if is two, Genet in the families Decivation of prepare (prince than taxpayer) is based on all information of which prepare has any knowledge and defendent, if is two, Genet in the families of prepare (prince than taxpayer) is based on all information of which prepare has any knowledge and defendent, if is two, Genet in the families of prepare (prince than taxpayer) is based on all information of which prepare has any knowledge and the families of officer frustee (b) Prince (b) Prince (c)   |                | •                                       | •                        |                 |                                  |  |  | <del></del>              | _                        |           |
| c Sharing of facilities, equipment, mailing lists, other assets, or paid employees  d If the answer to any of the above is "res," complete the following schedule. Column (a) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation decived 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 noncharinable exempt organization (d) Description of transfers, transactions, and sharing wrangements  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 52??  b If "Yes," complete the following schedule  (a) Name of organization (b) Type of organization (c) Description of relationship  N/A    Didder centiles of propagativities in partition is animated to the best of my knowledge and selective field in the propagative has any knowledge and selective field in the best of my knowledge and selective field in the best of my knowledge and selective field in the best of my knowledge and selective field in the best of my knowledge and selective field in the best of my knowledge and selective field in the best of my knowledge and selective field in the best of my knowledge and selective field in the best of my knowledge and selective field in the best of my knowledge and selective field in the best of my knowledge and selective field in the best of my knowledge and selective field in the best of my knowledge and selective field in the best of my knowledge and selective field in the best of my knowledge and selective field in the selective field in the best of my knowledge and selective field in the best of my knowledge and selective field in the best of my knowledge and selective field in the best of my knowledge and selective field in the best of my knowledge and selective field  |                | •                                       |                          |                 |                                  |  |  | <del>``</del>            | _                        |           |
| 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 green 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 noncharifable exempt organization (d) Description of transfers, transactions, and sharing arrangements in N/A.  2a Is the foundation directly or indirectly affiliated with, or robused to noncharifable exempt organizations described in section 501(c) (other than secti  |                |   |                          |                 |                                  |  |  | <del></del>              | +                        |           |
| 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.  (e) Namo of noncharitable exempt organization  (b) Amount involved  (c) Name of noncharitable exempt organization  (d) Description of irranders, transactions, and sharing arrangements  N/A  2a. It this 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 52??  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  25. In the foundation of the page of t  | =              |   | =                        |                 | • •                              | always show the fair                             | market value of the goods                        |                          |                          |           |
| column (d) the value of the goods, other assets, or services received.  (a) Line no (b) Amount involved (c) Name of nonchariable exempt organization (d) Description of variaties, transactions, and sharing arrangements  N/A  2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations (escribed in section 501(c) (other than section 501(c)(3)) or in section 52??  b If "Yes," complete the following schedule  (a) Name of organization (b) Type of organization (e) Description of relationship  N/A  Under penalties of period. Section (b) (c) (other than section for properer (other than taxapayor) is based on all information of which properer has any knowledge and statements, and to the best of my  |                | •                                       |                          | •               | • •                              | -  | - ·  |                          | 5615,                    |           |
| (a) Linear to (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) (other than section 501(c)(3)) or in section 52??  b If Yes, complete the following schedules  (a) Name of organization (b) Type of organization (c) Description of relationship  N/A  Sign  Under penalties of parts—tectors grantieve examined this return, including accompanying schedules and statements, and to the best of my knowledge and return with this preparer and return of the penalties of parts—tectors grantieve examined this return, including accompanying schedules and statements, and to the best of my knowledge and return with this preparer and return of organization of my knowledge and return with this preparer is the true (more). The true the continuous properties and return with this preparer solution selection of preparer (other than tax polyer) is based on all information of which preparer has any knowledge and statements, and to the best of my knowledge and statements, and to the best of my knowledge and return with this preparer.  N/A  N/A  N/A  Signature of officerfor trustee  Print/Type prehagers retire  Print/Type prehagers retire  Nicholas E. Porto  Print/SelN > 01-0494526  Firm's address > P.O. Box 507  |                |   |                          |                 |                                  | aide iii aily transactio                         | ir or snaring arrangement,                       | SHOW III                 |                          |           |
| N/A  2a Is the foundation directly or indirectly affiliated with, or rolated to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 52??  b If Yes,' complete the following schedule  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  Under penalties of period. A line of the period of period of prepare (other than taxpayer) is based on all information of which prepare has any knowledge and befield, it is five, generic influence of prepare (other than taxpayer) is based on all information of which prepare has any knowledge and befield, it is five, generic influence of prepare (other than taxpayer) is based on all information of which prepare has any knowledge and befield, it is five, generic influence of prepare (other than taxpayer) is based on all information of which prepare has any knowledge in the prepare of the prepare (other than taxpayer) is based on all information of which prepare has any knowledge in the prepare (other than taxpayer) is based on all information of which prepare has any knowledge in the prepare (other than taxpayer) is based on all information of which prepare has any knowledge in the prepare (other than taxpayer) is based on all information of which prepare has any knowledge in the prepare (other than taxpayer) is based on all information of which prepare has any knowledge in the prepare (other than taxpayer) is based on all information of which prepare has any knowledge in the prepare (other than taxpayer) is based on all information of which prepare has any knowledge in the prepare (other than taxpayer) is based on all information of which prepare has any knowledge in the prepare (other than taxpayer) is based on all information of which prepare has any knowledge in the prepare (other than taxpayer) in the prepare (other than taxpayer) is based on all information of which prepare that the prepare (other than taxpayer) is based on all information of which prepare that the prepare that the  |                |   |                          |                 |                                  | (d) Description                                  | n of transfers, transactions, and                | 1 sharing ai             | rrangeme                 | ents      |
| 2a Is the foundation directly or indirectly affiliated with, or rolated to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 52??  b If "Yes," complete the following schedule  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  | <del></del>    | (5)************************************ | (0)///                   |                 |                                  | (0) 00000  |  |                          |                          |           |
| In section 501(c) (other than section 501(c)(3)) or in section 527?  |                |   |                          |                 |                                  | <del></del>                                      |  |                          |                          |           |
| In section 501(c) (other than section 501(c)(3)) or in section 527?    Yes   |                | -                                       |                          |                 | <del></del>                      |  |  |                          |                          |           |
| In section 501(c) (other than section 501(c)(3)) or in section 527?  |                | <del></del>                             |                          |                 | <del></del>                      |  | <u> </u>   |                          |                          |           |
| In section 501(c) (other than section 501(c)(3)) or in section 527?    Yes   |                |   |                          |                 | ***                              | <del>                                     </del> |  |                          |                          |           |
| In section 501(c) (other than section 501(c)(3)) or in section 527?    Yes   |                |   |                          |                 |                                  |  |  |                          |                          |           |
| In section 501(c) (other than section 501(c)(3)) or in section 527?  |                |   |                          |                 |                                  |  |  |                          |                          |           |
| In section 501(c) (other than section 501(c)(3)) or in section 527?  |                |   |                          |                 |                                  |  |  |                          |                          |           |
| In section 501(c) (other than section 501(c)(3)) or in section 527?  |                |   |                          |                 |                                  |  |  |                          |                          |           |
| In section 501(c) (other than section 501(c)(3)) or in section 527?  |                |   |                          |                 |                                  |  |  |                          |                          |           |
| In section 501(c) (other than section 501(c)(3)) or in section 527?  |                | · <u>-</u>                              |                          |                 |                                  |  |  |                          |                          |           |
| In section 501(c) (other than section 501(c)(3)) or in section 527?  |                |   |                          |                 |                                  |  |  |                          |                          |           |
| In section 501(c) (other than section 501(c)(3)) or in section 527?  |                |   |                          |                 |                                  |  |  |                          |                          |           |
| In section 501(c) (other than section 501(c)(3)) or in section 527?  |                |   |                          |                 | <u></u>                          |  |  |                          |                          |           |
| In section 501(c) (other than section 501(c)(3)) or in section 527?  |                |   |                          |                 |                                  | <del></del>                                      |  |                          |                          |           |
| In section 501(c) (other than section 501(c)(3)) or in section 527?  |                | <del></del>                             | L                        |                 |                                  | <u> </u>   |  |                          |                          |           |
| (a) Name of organization  N/A  Under penalties of period disclare that have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, as the complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge return with the preparer shown belief. It is true, correct, as the complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge required with the preparer shown belief. It is true. Creck   | ın sectior     | n 501(c) (other than sectio             | n 501(c)(3)) or in se    | •               | or more tax-exempt orga          | inizations described                             |  | Yes                      | X                        | ] No      |
| N/A  Sign   Under penalties of perior in declare that mave examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, forect, abbetimplete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge return with the preparer solve below? See instriction with the preparer solve proparer's solve in the preparer is prime.  Print/Type preparer's name   Preparer's signature   Date   Check   if print   Prin  |                |   |                          |                 | (b) Type of organization         | 1  | (c) Description of relations                     | ship                     |                          |           |
| Sign Here  |                |   | <del></del>              |                 |                                  |  |  |                          |                          |           |
| Sign Here  |                |   |                          |                 |                                  |  |  |                          |                          |           |
| Sign Here  |                | <u> </u>                                |                          |                 |                                  |  |  |                          |                          |           |
| Sign Here  |                |   |                          |                 |                                  |  |  |                          |                          |           |
| Sign Here  |                |   |                          |                 |                                  |  |  |                          |                          |           |
| Paid Print/Type prebarer's same  Nicholas E. Porto Preparer Use Only  Print/Type prebarer's same Preparer  Nicholas E. Porto Nicholas E. Porto Noyes  Preparer  Firm's name ▶ Baker Newman & Noyes  Firm's address ▶ P.O. Box 507  | Sign Here      | pelief, it is true, correct, articom    |                          |                 | n taxpayer) is based on all Info | Truste   | r has any knowledge ret<br>sh                    | urn with th<br>own below | re prepare<br>/? See ins | er<br>str |
| Paid Preparer Use Only    Nicholas E. Porto   10/16/19   P01310283   | 1 ( <u>Sig</u> |   | <u></u>                  | Dranavar's a    |                                  |  | Check I if I DTIM                                |                          |                          |           |
| Paid Preparer Use Only    Nicholas E. Porto   10/16/19   P01310283   |                | ramo type preparer's pa                 | une                      | rieparer's s    | luiature ~                       | Date   | <u> </u>   |                          |                          |           |
| Preparer Use Only Firm's address ▶ P.O. Box 507  | Paid           | Nigholos 7                              | Domb -                   | /,              | $\langle A \cup A \rangle$       | 10/16/10   | · · · I  | 1210                     | 202                      |           |
| Use Only Firm's address ▶ P.O. Box 507   |                |   |                          | CNT             | 100                              | 10/10/13   |  |                          |                          |           |
| Firm's address ▶ P.O. Box 507  | •              |   | er newman                | г « иод         | es                               |  | LILLIA S FIN POT-0                               | 4740                     | 40                       |           |
|  | OSE OTHY       | II.                                     | O Boy FO                 | 7               |                                  |  | <del>                                     </del> |                          |                          |           |
|  |                |   |                          | •               |                                  |  | Phone no. (207)                                  | 879-                     | 210                      | 0         |

Form **990-PF** (2018)

| Rart XV <sub>i</sub> Supplementary Informatio  3 Grants and Contributions Paid During the |  | ·                    |  |             |
|---|--|----------------------|--|-------------|
| Recipient Recipient   | If recipient is an individual,                   | T                    |  |             |
| Name and address (home or business)   | show any relationship to any foundation manager  | Foundation status of | Purpose of grant or contribution                 | Amount      |
|   | or substantial contributor                       | recipient            |  |             |
| Cradles To Crayons, Inc.  | N/A  | PC                   | General Purpose                                  |             |
| 155 North Beacon Streeet  | N/ A   | 10                   | Seneral Purpose                                  |             |
| Boston, MA 02135  |  |                      |  | 5,000       |
| Habitat For Humanity Greater Boston   | N/A  | PC                   | General Purpose                                  |             |
| Inc.  | ,,,,   |                      |  |             |
| 240 Commercial Street, 4th Floor  |  |                      |  |             |
| Boston, MA 02109  |  |                      |  | 50,000      |
|   |  |                      |  |             |
| Palmer High School  | N/A  | GOV                  | High School Travel                               |             |
| 4105 Main Street  |  | i                    | Program  |             |
| Palmer, MA 01069  |  |                      |  | 10,000      |
| Project Bread - The Walk for Hunger   | N/A  | PC                   | General Purpose                                  |             |
| Inc.  |  | ļ                    |  |             |
| 145 Border Street   |  |                      |  |             |
| East Boston, MA 02128   | <del></del>                                      |                      |  | 50,000      |
|   |  |                      |  |             |
| Rebuilding Together   | N/A  | PC                   | Serving Those Who                                |             |
| P.O. Box 301209   |  |                      | Serve Initiative                                 |             |
| Jamaica Plain, MA 02130   | <del>  -</del>                                   | <del> </del>         |  | 8,000       |
|   |  |                      |  |             |
| Rehearsal for Life, Inc.<br>670 Centre Street, Suite 8                                    | N/A  | PC                   | General Purpose                                  |             |
| Jamaica Plain, MA 02130   |  |                      |  | 25,000      |
| - · · · · · · · · · · · · · · · · · · ·   |  |                      |  | <del></del> |
| Rosie's Place   | N/A  | PC                   | General Purpose                                  |             |
| 889 Harrison Avenue   | .,,,,  | "                    | Jones La Popo                                    |             |
| Boston, MA 02118  |  | <u> </u>             |  | 15,000      |
|   |  |                      |  |             |
| Salvation Army, Abington Unit   | N/A  | PC                   | General Purpose                                  |             |
| 216 Centre Street   |  |                      |  |             |
| Brockton, MA 02303  | <del></del>                                      |                      |  | 10,000      |
|   |  |                      |  | ı           |
| South Shore YMCA  | N/A  | PC                   | South Shore Natural                              |             |
| 141 Longwater Drive, Suite 110  |  |                      | Science Center                                   | E 000       |
| Norwell, MA_02061   | <del>                                     </del> |                      | <del>                                     </del> | 5,000       |
|   |  |                      |  |             |
| Thayer Academy<br>475 Washington Street   | N/A  | PC                   | General Purpose                                  |             |
| Braintree, MA 02184-5798  |  |                      |  | 2,000.      |
| Total from continuation sheets  |  | <del></del>          | <u> </u>   | 190,000.    |

| 3 Grants and Contributions Paid During the | Year (Continuation)  |                     |                                  |        |
|--|--|---------------------|----------------------------------|--------|
| Recipient                                  | If recipient is an individual,   | Foundation          | Purpose of grant or              |        |
| Name and address (home or business)        | If recipient is an individual,<br>show any relationship to<br>any foundation manager<br>or substantial contributor | status of recipient | Purpose of grant or contribution | Amount |
|  |  |                     |                                  |        |
| The Walden Woods Project                   | N/A  | PC                  | General Purpose                  |        |
| 44 Baker Farm Road                         |  | Ì                   |                                  | F 00   |
| dincoln, MA 01773                          |  |                     |                                  | 5,00   |
| Whitman-Hanson Regional Schools            | N/A  | GOV                 | Special Education                |        |
| 510 Franklin Street                        |  | [                   | Autism Program                   |        |
| Thitman, MA 02382                          | · ·  |                     |                                  | 5,00   |
|  |  |                     |                                  |        |
|  |  |                     |                                  |        |
| ·····                                      | · <del></del>  |                     |                                  |        |
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|  |  |                     |                                  |        |
|  |  |                     |                                  |        |

## Schedule B

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

Department of the Treasury Internal Revenue Service

Name of the organization

## **Schedule of Contributors**

► Attach to Form 990, Form 990-EZ, or Form 990-PF.

OMB No 1545-0047

Employer identification number

► Go to www.irs.gov/Form990 for the latest information.

| Traine or the organization                         | Cecile Higginson Murphy<br>Charitable Foundation  | 04-3447397   |
|--|---|--|
| Organization type (che                             |   | 04 3447337   |
| Filers of:   | Section:  |  |
| Form 990 or 990 EZ                                 | 501(c)( ) (enter number) organization   |  |
|  | 4947(a)(1) nonexempt charitable trust <b>not</b> treated as a private foundation  |  |
|  | 527 political organization  |  |
| Form 990-PF  | X 501(c)(3) exempt private foundation   |  |
|  | 4947(a)(1) nonexempt charitable trust treated as a private foundation   |  |
|  | 501(c)(3) taxable private foundation  |  |
|  |   |  |
|  | on is covered by the <b>General Rule</b> or a <b>Special Rule.</b><br>i1(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special R   | ule See instructions                                   |
| General Rule                                       |   |  |
| -  | ation filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling any one contributor. Complete Parts I and II. See instructions for determining a contributor.   |  |
| Special Rules                                      |   |  |
| sections 509(a<br>any one contri                   | ation described in section 501(c)(3) filing Form 990 or 990·EZ that met the 33 1/3% support<br>o)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990·EZ), Part II, line 13, 16a<br>butor, during the year, total contributions of the greater of (1) \$5,000, or (2) 2% of the amo<br>o)-EZ, line 1 Complete Parts I and II  | a, or 16b, and that received from                      |
| year, total con                                    | ation described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received fron tributions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or educruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the  | cational purposes, or for the                          |
| year, contribut<br>is checked, en<br>purpose Don't | ation described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from ions exclusively for religious, charitable, etc., purposes, but no such contributions totaled in ter here the total contributions that were received during the year for an exclusively religious to complete any of the parts unless the <b>General Rule</b> applies to this organization because if table, etc., contributions totaling \$5,000 or more during the year | nore than \$1,000 If this box<br>is, charitable, etc , |
| but it must answer "No                             | on that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B in on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its least the filing requirements of Schedule B (Form 990, 990-FZ, 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
Cecile Higginson Murphy
Charitable Foundation

Employer identification number

04-3447397

| Part I     | Contributors (see instructions) Use duplicate copies of Part I if addition          | al space is needed         |   |
|------------|---|----------------------------|---|
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions | (d)<br>Type of contribution   |
| 1          | Cecile Higginson Murphy Choate Hall & Stewart LLP Two Int'l Place  Boston, MA 02110 | \$                         | Person X Payroll  |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions | (d)<br>Type of contribution   |
|            |   | \$                         | Person Payroll Noncash (Complete Part II for noncash contributions) |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c) Total contributions    | (d) Type of contribution  |
|            |   | \$                         | Person Payroll Noncash Complete Part II for noncash contributions ) |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions | (d)<br>Type of contribution   |
|            |   | \$                         | Person Payroll Oncash Complete Part II for noncash contributions )  |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions | (d)<br>Type of contribution   |
|            |   | \$                         | Person Payroll Noncash (Complete Part II for noncash contributions) |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c) Total contributions    | (d)<br>Type of contribution   |
|            |   | \$                         | Person Payroll Noncash (Complete Part II for noncash contributions) |

Name of organization Cecile Higginson Murphy Charitable Foundation

Employer identification number

04-3447397

| art II                       | Noncash Property (see instructions) Use duplicate copies of Part | II if additional space is needed          |                      |
|------------------------------|--|---|----------------------|
| (a)<br>No.<br>from<br>Part I | (b)  Description of noncash property given                       | (c) FMV (or estimate) (See instructions ) | (d)<br>Date received |
| 1                            | 2035 shares of First TR Dow Jones<br>Internet Index Fund         |   | ·                    |
|                              |  |   | 12/14/18             |
| (a)<br>No.<br>from<br>Part I | (b)<br>Description of noncash property given                     | (c) FMV (or estimate) (See instructions)  | (d)<br>Date received |
|                              |  | \$  |                      |
| (a)<br>No.<br>from<br>Part I | (b)  Description of noncash property given                       | (c) FMV (or estimate) (See instructions)  | (d)<br>Date received |
|                              |  | s   |                      |
| (a)<br>No.<br>from<br>Part I | (b)  Description of noncash property given                       | (c) FMV (or estimate) (See instructions)  | (d)<br>Date received |
|                              |  |   |                      |
| (a)<br>No.<br>from<br>Part I | (b) Description of noncash property given                        | (c) FMV (or estimate) (See instructions)  | (d)<br>Date received |
| _                            |  |   |                      |
| (a)<br>No.<br>rom<br>Part I  | (b) Description of noncash property given                        | (c) FMV (or estimate) (See instructions)  | (d)<br>Date received |
|                              |  |   |                      |

Schedule B (Form 990, 990-EZ, or 990-PF) (2018) Page 4 Name of organization Employer identification number Cecile Higginson Murphy 04-3447397 Charitable Foundation 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 (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (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 (d) Description of how gift is held (c) Use of gift (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 (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee

|                           |                 |                             |                        |                           | ·                            |                               |     |
|---------------------------|-----------------|-----------------------------|------------------------|---------------------------|------------------------------|-------------------------------|-----|
| Form 990-PF Intere        | st on Savi      | ngs and T                   | emporary               | Cash                      | Investments                  | Statement                     | 1   |
| Source                    |                 | Re <sup>-</sup>             | (a)<br>venue<br>Books  |                           | (b)<br>Investment<br>Income  | (c)<br>Adjusted<br>Net Income | е   |
| Blackrock Liq Fd Fe       | ed Trst         |                             | 7,246.                 |                           | 7,246.                       |                               |     |
| Total to Part I, li       | ne 3            |                             | 7,246.                 |                           | 7,246.                       |                               |     |
| Form 990-PF               | Dividend        | ls and Int                  | erest fr               | om Sec                    | urities                      | Statement                     | 2   |
| Source                    | Gross<br>Amount | Capit<br>Gain<br>Divide     | s F                    | (a)<br>Revenue<br>er Book |                              |                               |     |
| Dividends and<br>Interest | 187,727         | 7. 38,                      | 384.                   | 149,34                    | 3. 149,34                    | 13.                           |     |
| To Part I, line 4         | 187,727         | 38,                         | 384.                   | 149,34                    | 3. 149,34                    | 13.                           |     |
| Form 990-PF               |                 | Other                       | Income                 |                           |                              | Statement                     | 3   |
| Description               |                 |                             | (a)<br>Rever<br>Per Bo | ue                        | (b) Net Invest- ment Income  |                               |     |
| Passthrough Income        |                 | -                           | <                      | 1,916.                    | > <1,776                     | ·>                            |     |
| Total to Form 990-F       | F, Part I,      | line 11                     | <                      | 1,916.                    | > <1,776                     | ··>                           |     |
| Form 990-PF               |                 | Accoun                      | ting Fee               | es                        |                              | Statement                     | 4   |
| Description               |                 | (a)<br>Expenses<br>Per Book | Net I                  | b)<br>Invest-<br>Income   | (c)<br>Adjusted<br>Net Incom |                               |     |
| Tax Prep Fees             | _               | 2,40                        | 0.                     | 1,200                     | •                            | 1,2                           | 00. |
| To Form 990-PF, Pg        | 1, ln 16b       | 2,40                        | 0.                     | 1,200                     | •                            | 1,2                           | 00. |
|                           | =               |                             |                        |                           |                              | <del></del>                   |     |

| Form 990-PF (                        | Other Profes                 | sional Fe                   | es          |                              | Statement 5          |
|--------------------------------------|------------------------------|-----------------------------|-------------|------------------------------|----------------------|
| Description                          | (a)<br>Expenses<br>Per Books | (b)<br>Net Inve<br>ment Inc |             | (c)<br>Adjusted<br>Net Incom |                      |
| Fiduciary Fees                       | 69,465.                      | 51,                         | 404.        |                              | 18,061.              |
| To Form 990-PF, Pg 1, ln 16c         | 69,465.                      | 51,                         | 404.        |                              | 18,061.              |
| Form 990-PF                          | Тах                          | es                          |             |                              | Statement 6          |
| Description                          | (a)<br>Expenses<br>Per Books | (b)<br>Net Inve<br>ment Inc |             | (c)<br>Adjusted<br>Net Incom |                      |
| Excise Tax Foreign Taxes             | 24,612.<br>3,819.            | 3,                          | 0.<br>819.  |                              | 0.                   |
| To Form 990-PF, Pg 1, ln 18          | 28,431.                      | 3,                          | 819.        |                              | 0.                   |
| Form 990-PF                          | Other E                      | xpenses                     |             |                              | Statement 7          |
| Description                          | (a)<br>Expenses<br>Per Books | (b)<br>Net Inve<br>ment Inc |             | (c)<br>Adjusted<br>Net Incom |                      |
| Massachusetts Filing Fee for Form PC | 125.                         |                             | 0.          |                              | 125.                 |
| To Form 990-PF, Pg 1, ln 23          | 125.                         |                             | 0.          |                              | 125.                 |
| Form 990-PF                          | Corporat                     | e Stock                     | <del></del> |                              | Statement 8          |
| Description                          |                              |                             | Вос         | ok Value                     | Fair Market<br>Value |
|                                      |                              | -                           |             |                              |                      |
| Corporate Stocks - Statement         | 11                           |                             | 5           | ,181,269.                    | 5,181,269.           |

| Form 990-PF   | Corporate Bonds     |            | Statement 9          |
|---|---------------------|------------|----------------------|
| Description   |                     | Book Value | Fair Market<br>Value |
| Corporate Bonds - Statement 11                              |                     | 481,064.   | 481,064.             |
| Total to Form 990-PF, Part II,                              | line 10c            | 481,064.   | 481,064.             |
| Form 990-PF (   | Other Investments   |            | Statement 10         |
| Description   | Valuation<br>Method | Book Value | Fair Market<br>Value |
| Alternative Investments - States 11 1899 Opportunities Fund | ment FMV            | 1,647,421. | 1,647,421.           |
| Total to Form 990-PF, Part II,                              | line 13             | 1,680,413. | 1,680,413.           |