

Form 990-PF

Department of the Treasury  
Internal Revenue Service

## Return of Private Foundation

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

► Do not enter social security numbers on this form as it may be made public

► Go to [www.irs.gov/Form990PF](http://www.irs.gov/Form990PF) for instructions and the latest information.

For calendar year 2018 or tax year beginning

JUL 1, 2018

, and ending

JUN 30, 2019

Name of foundation

**EASTERN CHARITABLE FOUNDATION**  
C/O ALAN STEINERT

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

993 MEMORIAL DRIVE

Room/suite

203

A Employer identification number

04-6044620

B Telephone number

(617) 290-4222

C If exemption application is pending, check here ►

G Check all that apply:

<input type="checkbox"/> Initial return	<input type="checkbox"/> Initial return of a former public charity
<input type="checkbox"/> Final return	<input type="checkbox"/> Amended return
<input type="checkbox"/> Address change	<input type="checkbox"/> Name change

H Check type of organization:  Section 501(c)(3) exempt private foundation Section 4947(a)(1) nonexempt charitable trust  Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16)

► \$ 1,353,488. (Part I, column (d) must be on cash basis.)

## Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received			N/A	
2 Check ► <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments	3,146.	3,146.		STATEMENT 1
4 Dividends and interest from securities	12,742.	12,742.		STATEMENT 2
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	214,816.			
b Gross sales price for all assets on line 8a	681,977.			
7 Capital gain net income (from Part IV, line 2)		214,816.		
8 Net short-term capital gain				
9 Income modifications				
Gross sales less returns and allowances				
10a				
b Less Cost of goods sold				
c Gross profit or (loss)				
11 Other income	22,473.	22,473.		STATEMENT 3
12 Total. Add lines 1 through 11	253,177.	253,177.		
	0.	0.		0.
13 Compensation of officers, directors, trustees, etc				
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees	1,850.	0.		
b Accounting fees	12,828.	12,828.		0.
c Other professional fees				0.
17 Interest				
18 Taxes	69.	69.		0.
19 Depreciation and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses	275.	801.		0.
24 Total operating and administrative expenses Add lines 13 through 23	15,022.	13,698.		0.
25 Contributions, gifts, grants paid	60,500.			60,500.
26 Total expenses and disbursements. Add lines 24 and 25	75,522.	13,698.		60,500.
27 Subtract line 26 from line 12:	177,655.			
a Excess of revenue over expenses and disbursements				
b Net investment income (if negative, enter -0-)		239,479.		
c Adjusted net income (if negative, enter -0-)			N/A	

RECEIVED  
NOV 12 2019  
B519  
IRS-OSC  
OGDEN, UT

SCANNED JAN 16 2020

Operating and Administrative Expenses

RECEIVED  
NOV 12 2019  
B519  
IRS-OSC  
OGDEN, UT

## EASTERN CHARITABLE FOUNDATION

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C/O ALAN STEINERT

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing		11,938.	48,683.	48,683.
	2 Savings and temporary cash investments		65,183.		
	3 Accounts receivable ►				
	Less: allowance for doubtful accounts ►				
	4 Pledges receivable ►				
	Less: allowance for doubtful accounts ►				
	5 Grants receivable				
	6 Receivables due from officers, directors, trustees, and other disqualified persons				
	7 Other notes and loans receivable ►				
	Less: allowance for doubtful accounts ►				
	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges				
	10a Investments - U.S. and state government obligations				
	b Investments - corporate stock	STMT 8	583,919.	745,520.	1,275,935.
	c Investments - corporate bonds				
	11 Investments - land, buildings, and equipment: basis ►				
	Less accumulated depreciation ►				
	12 Investments - mortgage loans				
	13 Investments - other				
	14 Land, buildings, and equipment: basis ►				
	Less accumulated depreciation ►				
	15 Other assets (describe ►) STATEMENT 9 )		-19,520.	24,972.	28,870.
	16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		641,520.	819,175.	1,353,488.
Liabilities	17 Accounts payable and accrued expenses				
	18 Grants payable				
	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable				
	22 Other liabilities (describe ►) )				
	23 Total liabilities (add lines 17 through 22)		0.	0.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ► <input type="checkbox"/>				
	and complete lines 24 through 26, and lines 30 and 31				
	24 Unrestricted				
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here ► <input checked="" type="checkbox"/>				
	and complete lines 27 through 31				
	27 Capital stock, trust principal, or current funds		482,772.	482,772.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds		158,748.	336,403.	
	30 Total net assets or fund balances		641,520.	819,175.	
	31 Total liabilities and net assets/fund balances		641,520.	819,175.	

## Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	641,520.
2 Enter amount from Part I, line 27a	2	177,655.
3 Other increases not included in line 2 (itemize) ►	3	0.
4 Add lines 1, 2, and 3	4	819,175.
5 Decreases not included in line 2 (itemize) ►	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	819,175.

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

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)			(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a VIA CHARLES SCHWAB			P		
b VIA WINSLOW, EVANS & CROCKER			P		
c VIA WINSLOW, EVANS & CROCKER			P		
d VIA CHARLES SCHWAB			P		
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		(h) Gain or (loss) ((e) plus (f) minus (g))	
a 496,974.		294,341.		202,633.	
b 46,491.		25,041.		21,450.	
c 110,470.		110,090.		380.	
d 28,042.		37,689.		-9,647.	
e Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.				(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
a				202,633.	
b				21,450.	
c				380.	
d				-9,647.	
e					
2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7		2		214,816.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	{		3		N/A

## Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

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

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

 Yes  No

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

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2017	66,500.	1,324,871.	.050194
2016	94,242.	1,171,382.	.080454
2015	97,981.	1,200,254.	.081634
2014	90,592.	1,285,849.	.070453
2013	73,472.	1,207,223.	.060860

2 Total of line 1, column (d)

2 .343595

3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years

3 .068719

4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5

4 1,296,513.

5 Multiply line 4 by line 3

5 89,095.

6 Enter 1% of net investment income (1% of Part I, line 27b)

6 2,395.

7 Add lines 5 and 6

7 91,490.

8 Enter qualifying distributions from Part XII, line 4

8 60,500.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.  
See the Part VI instructions.

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ► <input type="checkbox"/> and enter "N/A" on line 1.	1	4,790.
	Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► <input type="checkbox"/> and enter 1% of Part I, line 27b		
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b).		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	2	0.
3	Add lines 1 and 2	3	4,790.
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	4,790.
6	Credits/Payments:		
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	447.
b	Exempt foreign organizations - tax withheld at source	6b	0.
c	Tax paid with application for extension of time to file (Form 8868)	6c	0.
d	Backup withholding erroneously withheld	6d	0.
7	Total credits and payments. Add lines 6a through 6d	7	447.
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	172.
9	Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed	9	4,515.
10	Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be: Credited to 2019 estimated tax ►	11	Refunded

## Part VII-A Statements Regarding Activities

		Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.	1b	X
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 the year: (1) On the foundation. ► \$ 0. (2) On foundation managers. ► \$ 0.		
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ 0.		
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2	X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3	X
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	X
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by <i>General Instruction T</i>	5	X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	7	X
8a	Enter the states to which the foundation reports or with which it is registered. See instructions. ► <b>MA</b>		
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G</i> ? If "No," attach explanation	8b	X
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV	9	X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	X

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**Part VII-A Statements Regarding Activities (continued)**

<p>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</p> <p>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</p> <p>13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u></p> <p>14 The books are in care of ► <u>ALAN STEINERT</u> Telephone no. ► <u>(617) 290-4222</u> Located at ► <u>993 MEMORIAL DRIVE, CAMBRIDGE, MA</u> ZIP+4 ► <u>02138-4898</u></p> <p>15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year ► <u>15</u> N/A ► <u>      </u></p> <p>16 At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ► <u>      </u></p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: center; padding: 2px;">Yes</th> <th style="text-align: center; padding: 2px;">No</th> </tr> </thead> <tbody> <tr> <td style="text-align: center; padding: 2px;">11</td> <td style="text-align: center; padding: 2px;">X</td> </tr> <tr> <td style="text-align: center; padding: 2px;">12</td> <td style="text-align: center; padding: 2px;">X</td> </tr> <tr> <td style="text-align: center; padding: 2px;">13</td> <td style="text-align: center; padding: 2px;">X</td> </tr> </tbody> </table>	Yes	No	11	X	12	X	13	X
Yes	No								
11	X								
12	X								
13	X								

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

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

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

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

	<b>Yes</b>	<b>No</b>
5a During the year, did the foundation pay or incur any amount to:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	<b>N/A</b> ► <input type="checkbox"/>	
Organizations relying on a current notice regarding disaster assistance, check here		
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	<b>N/A</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
If "Yes," attach the statement required by Regulations section 53.4945-5(d).		
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	<b>N/A</b>	
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**

**1 List all officers, directors, trustees, and foundation managers and their compensation.**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 10		0.	0.	0.

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

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

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

► 0

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

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

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

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

►

0

**Part IX-A | Summary of Direct Charitable Activities**

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

Expenses

1	N/A	
2		
3		
4		

**Part IX-B | Summary of Program-Related Investments**

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

Amount

1	N/A	
2		
3		

All other program-related investments. See instructions.

3		

**Total. Add lines 1 through 3**

►

0.

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**Part X Minimum Investment Return** (All domestic foundations must complete this part Foreign foundations, see instructions)

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a Average monthly fair market value of securities	1a	1,189,281.
b Average of monthly cash balances	1b	126,976.
c Fair market value of all other assets	1c	
d <b>Total</b> (add lines 1a, b, and c)	1d	1,316,257.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3	1,316,257.
4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	19,744.
5 <b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,296,513.
6 <b>Minimum investment return</b> Enter 5% of line 5	6	64,826.

**Part XI Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here ►  and do not complete this part.)

1 Minimum investment return from Part X, line 6	1	64,826.
2a Tax on investment income for 2018 from Part VI, line 5	2a	4,790.
b Income tax for 2018. (This does not include the tax from Part VI.)	2b	
c Add lines 2a and 2b	2c	4,790.
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	60,036.
4 Recoveries of amounts treated as qualifying distributions	4	0.
5 Add lines 3 and 4	5	60,036.
6 Deduction from distributable amount (see instructions)	6	0.
7 <b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	60,036.

**Part XII Qualifying Distributions** (see instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	60,500.
b Program-related investments - total from Part IX-B	1b	0.
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3 Amounts set aside for specific charitable projects that satisfy the:		
a Suitability test (prior IRS approval required)	3a	
b Cash distribution test (attach the required schedule)	3b	
4 <b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	60,500.
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 <b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	60,500.

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

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**Part XIII Undistributed Income (see instructions)**

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				60,036.
2 Undistributed income, if any, as of the end of 2018			0.	
a Enter amount for 2017 only				
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2018:				
a From 2013	16,093.			
b From 2014	27,878.			
c From 2015	38,904.			
d From 2016	35,739.			
e From 2017	256.			
f Total of lines 3a through e	118,870.			
4 Qualifying distributions for 2018 from Part XII, line 4: ► \$ 60,500.			0.	
a Applied to 2017, but not more than line 2a				
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2018 distributable amount			60,036.	
e Remaining amount distributed out of corpus	464.			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:	119,334.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2017. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2013 not applied on line 5 or line 7	16,093.			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	103,241.			
10 Analysis of line 9:				
a Excess from 2014	27,878.			
b Excess from 2015	38,904.			
c Excess from 2016	35,739.			
d Excess from 2017	256.			
e Excess from 2018	464.			



**EASTERN CHARITABLE FOUNDATION**  
**C/O ALAN STEINERT**

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**Part XV Supplementary Information (continued)**

<b>3 Grants and Contributions Paid During the Year or Approved for Future Payment</b>				
<b>Recipient</b>	<b>If recipient is an individual, show any relationship to any foundation manager or substantial contributor</b>	<b>Foundation status of recipient</b>	<b>Purpose of grant or contribution</b>	<b>Amount</b>
<b>a Paid during the year</b>				
ACLU FOUNDATION OF MASS 211 CONGRESS STREET <u>BOSTON, MA 02110</u>	NONE	OTHER PUBLIC CHARITY	CIVIC	1,000.
ALMA DEL MAR CHARTER SCHOOL 26 MADEIRA AVE <u>NEW BEDFORD, MA 02746</u>	NONE	OTHER PUBLIC CHARITY	CIVIC	2,000.
CAMBRIDGE COMMUNITY FOUNDATION 99 BISHOP RICHARD ALLEN DR. <u>CAMBRIDGE, MA 02139</u>	NONE	OTHER PUBLIC CHARITY	CIVIC	2,000.
CAMBRIDGE HISTORICAL SOCIETY 159 BRATTLE STREET <u>CAMBRIDGE, MA 02138</u>	NONE	OTHER PUBLIC CHARITY	CIVIC	1,000.
CAMBRIDGE PUBLIC LIBRARY FOUNDATION 449 BROADWAY <u>CAMBRIDGE, MA 02138</u>	NONE	OTHER PUBLIC CHARITY	CIVIC	1,000.
<b>Total</b>	<b>SEE CONTINUATION SHEET(S)</b>			► 3a 60,500.
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>				► 3b 0.

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**EASTERN CHARITABLE FOUNDATION  
C/O ALAN STEINERT**

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**Part XV | Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
CHARLES RIVER CONSERVANCY 4 BRATTLE STREET <u>CAMBRIDGE, MA 02138</u>	NONE	OTHER PUBLIC CHARITY	CIVIC	1,000.
COMPASSION & CHOICES P.O. BOX 101810 <u>DENVER, CO 80250</u>	NONE	OTHER PUBLIC CHARITY	CIVIC	1,000.
FENWAY HIGHSCHOOL FUND 174 IPSWICH STREET <u>BOSTON, MA 02215</u>	NONE	OTHER PUBLIC CHARITY	EDUCATIONAL	6,500.
FIRST CHURCHE OF CAMBRIDGE 11 GARDEN STREET <u>CAMBRIDGE, MA 02138</u>	NONE	OTHER PUBLIC CHARITY	CIVIC	1,000.
HOSPICE OF CAMBRIDGE 391 BROADWAY <u>EVERETT, MA 02149</u>	NONE	OTHER PUBLIC CHARITY	CIVIC	1,000.
MOUNT AUBURN HOSPITAL 330 MOUNT AUBURN STREET <u>CAMBRIDGE, MA 02138</u>	NONE	OTHER PUBLIC CHARITY	CIVIC	1,000.
NEW ENGLAND AQUARIUM 1 CENTRAL WHARF <u>BOSTON, MA 02110</u>	NONE	OTHER PUBLIC CHARITY	CIVIC	500.
OUR SISTER'S SCHOOL 145 BROWNELL AVE. <u>NEW BEDFORD, MA 02740</u>	NONE	OTHER PUBLIC CHARITY	EDUCATIONAL	1,000.
PIONEER INSTITUTE 85 DEVONSHIRE STREET <u>BOSTON, MA 02109</u>	NONE	OTHER PUBLIC CHARITY	EDUCATIONAL	3,000.
PLANNED PARENTHOOD OF MASS 1065 COMMONWEALTH AVE <u>BOSTON, MA 02215</u>	NONE	OTHER PUBLIC CHARITY	CIVIC	1,000.
<b>Total from continuation sheets</b>				<b>53,500.</b>

**EASTERN CHARITABLE FOUNDATION  
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**Part XV | Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
PROSPECT HILL ACADEMY CHARTER SCHOOL FOUNDATION 50 ESSEX STREET <u>CAMBRIDGE, MA 02139</u>	NONE	OTHER PUBLIC CHARITY	EDUCATIONAL	12,000.
ST. LUKES HOSPITAL 1026 A AVENUE <u>CEDAR RAPIDS, IA 52402</u>	NONE	OTHER PUBLIC CHARITY	CIVIC	1,000.
WGBH 1 GUEST STREET <u>BRIGHTON, MA 02135</u>	NONE	OTHER PUBLIC CHARITY	EDUCATIONAL	1,500.
YALE UNIVERSITY 157 CHURCH STREET <u>NEW HAVEN, CT 06510</u>	NONE	OTHER PUBLIC CHARITY	EDUCATIONAL	1,000.
ZOO NEW ENGLAND 1 FRANKLIN PARK ROAD <u>BOSTON, MA 02121</u>	NONE	OTHER PUBLIC CHARITY	CIVIC	1,000.
BECKET CHIMNEY CORNERS - YMCA 748 HAMILTON RD <u>BECKET, MA 01223</u>	NONE	OTHER PUBLIC CHARITY	CIVIC	3,000.
BRIMMER AND MAY SCHOOL 69 MIDDLESEX RD <u>CHESTNUT HILL, MA 02467</u>	NONE	OTHER PUBLIC CHARITY	EDUCATIONAL	1,000.
CAMBRIDGE CENTER FOR ADULT EDUCATION 42 BRATTLE STREET <u>CAMBRIDGE, MA 02138</u>	NONE	OTHER PUBLIC CHARITY	EDUCATIONAL	1,000.
CHILDREN'S HOSPITAL FOUNDATION 401 PARK DRIVE, SUITE 102 18 ROPEDER RD, SUITE 600 <u>BOSTON, MA 02115</u> SILVER SPRING, MD 20910	NONE	OTHER PUBLIC CHARITY	CIVIC	1,000.
DE NOVO F.K.A. COMMUNITY LEGAL SERVICES AND COUNSELING CENTER 47 THORNDIKE STREET, SUITE SB-LL-1 <u>CAMBRIDGE, MA 02141</u>	NONE	OTHER PUBLIC CHARITY	CIVIC	1,000.
<b>Total from continuation sheets</b>				

**EASTERN CHARITABLE FOUNDATION  
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**Part XV | Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
EASTERN MASSACHUSETTS ABORTION FUND P.O. BOX 390412 CAMBRIDGE, MA 02139	NONE	OTHER PUBLIC CHARITY	CIVIC	1,000.
EMERGE - CENTER AGAINST DOMESTIC ABUSE 2545 E. ADAMS STREET TUCSON, AZ 85716	NONE	OTHER PUBLIC CHARITY	CIVIC	1,000.
EXECUTIVE SERVICE CORPS 176 FEDERAL STREET BOSTON, MA 02110	NONE	OTHER PUBLIC CHARITY	CIVIC	2,500.
HARVARD SQUARE HOMELESS SHELTER 66 WINTHROP ST. CAMBRIDGE, MA 02138	NONE	OTHER PUBLIC CHARITY	CIVIC	1,000.
IFP FISCAL SPONSORSHIP 30 JOHN STREET, GROUND FLOOR BROOKLYN, NY 11201	NONE	OTHER PUBLIC CHARITY	CIVIC	2,000.
MUSEUM OF FINE ARTS 465 HUNTINGTON AVE BOSTON, MA 02115	NONE	OTHER PUBLIC CHARITY	EDUCATIONAL	500.
MUSEUM OF SCIENCE 1 MUSEUM OF SCIENCE DRIVEWAY BOSTON, MA 02114	NONE	OTHER PUBLIC CHARITY	EDUCATIONAL	500.
URBAN COLLEGE OF BOSTON 2 BOYLSTON ST BOSTON, MA 02116	NONE		EDUCATIONAL	3,500.
URBAN IMPROV/REHEARSAL FOR LIFE 670 CENTRE STREET SUITE 8 JAMAICA PLAIN, MA 02130	NONE		CIVIC	1,000.
<b>Total from continuation sheets</b>				

## Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments				14	3,146.
4 Dividends and interest from securities				14	12,742.
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income				14	22,473.
8 Gain or (loss) from sales of assets other than inventory				18	214,816.
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		253,177.	0.
13 Total Add line 12, columns (b), (d), and (e)			13		253,177.

## **Part XVI B Relationship of Activities to the Accomplishment of Event Purposes**

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



## FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
WINSLOW, EVANS & CROCKER	3,146.	3,146.	
TOTAL TO PART I, LINE 3	3,146.	3,146.	

## FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
WINSLOW, EVANS & CROCKER	12,742.	0.	12,742.	12,742.	
TO PART I, LINE 4	12,742.	0.	12,742.	12,742.	

## FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
OTHER INCOME	22,473.	22,473.	
TOTAL TO FORM 990-PF, PART I, LINE 11	22,473.	22,473.	

## FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	1,850.	0.		0.
TO FORM 990-PF, PG 1, LN 16B	1,850.	0.		0.

## FORM 990-PF

## OTHER PROFESSIONAL FEES

## STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MGMT FEES	12,828.	12,828.		0.
TO FORM 990-PF, PG 1, LN 16C	12,828.	12,828.		0.

## FORM 990-PF

## TAXES

## STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	69.	69.		0.
TO FORM 990-PF, PG 1, LN 18	69.	69.		0.

## FORM 990-PF

## OTHER EXPENSES

## STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
STATE FILING FEES	175.	0.		0.
MISC. EXPENSES	100.	0.		0.
FROM K-1 - ENTERPRISE PRODUCTS PARTNERS LP	0.	801.		0.
TO FORM 990-PF, PG 1, LN 23	275.	801.		0.

## FORM 990-PF

## CORPORATE STOCK

## STATEMENT 8

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCKS - SEE ATTACHED SCHEDULE	745,520.	1,275,935.
TOTAL TO FORM 990-PF, PART II, LINE 10B	745,520.	1,275,935.

FORM 990-PF

OTHER ASSETS

STATEMENT

9

DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
INVESTMENT IN ENTERPRISE PRODUCTS	-19,520.	24,972.	28,870.
TO FORM 990-PF, PART II, LINE 15	-19,520.	24,972.	28,870.

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS  
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT

10

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN EXPENSE CONTRIB ACCOUNT
ALAN STEINERT JR. 993 MEMORIAL DRIVE, APT 203 CAMBRIDGE, MA 02138	PRESIDENT 0.00	0.	0.
SUSAN S. POVERMAN 100 OLD BILLERICA ROAD BEDFORD, MA 01730	DIRECTOR 0.00	0.	0.
JESSICA B. AGUILERA-STEINERT 92 WESTCHESTER ROAD JAMAICA PLAIN, MA 02030	VICE PRESIDENT 0.00	0.	0.
TESSA M. STEINERT-EVOY 20 COMMON STREET, UNIT 20 WATERTOWN, MA 02472	SECRETARY 0.00	0.	0.
ALEXANDRA T. STEINERT-EVOY 20 COMMON STREET, UNIT 20 WATERTOWN, MA 02472	MEMBER 0.00	0.	0.
JOHN A. STEINERT 15 MAIN STREET, SUITE 305 WATERTOWN, MA 02472	TREASURER 0.00	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.