

For calendar year 2018, or tax year beginning 10-01-2018, and ending 09-30-2019

Name of foundation GEORGE H & JANE A MIFFLIN MEMORIAL FUND		A Employer identification number 04-6384983	
Number and street (or P O box number if mail is not delivered to street address) LWC 230 CONGRESS STREET 12FL		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code BOSTON, MA 02110		B Telephone number (see instructions) (617) 523-6531	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here 2 Foreign organizations meeting the 85% test, check here and attach computation	
H Check type of organization ☐ Section 501(c)(3) exempt private foundation ☒ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 56,052,679		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) (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) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	56,240	57,136		
	4 Dividends and interest from securities	626,270	626,270		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	2,475,570			
	b Gross sales price for all assets on line 6a				
		6,244,366			
	7 Capital gain net income (from Part IV, line 2)		2,475,570		
	8 Net short-term capital gain				
	9 Income modifications				
Operating and Administrative Expenses	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	8,133	0		
	12 Total. Add lines 1 through 11	3,166,213	3,158,976		
	13 Compensation of officers, directors, trustees, etc	104,019	72,813		31,206
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	33,946	33,946		0
	c Other professional fees (attach schedule)	112,925	75,325		37,600
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	100,968	12,415		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	3,987	237		3,750
	24 Total operating and administrative expenses. Add lines 13 through 23	355,845	194,736		72,556
	25 Contributions, gifts, grants paid	2,331,000			2,331,000
	26 Total expenses and disbursements. Add lines 24 and 25	2,686,845	194,736		2,403,556
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	479,368			
	b Net investment income (if negative, enter -0-)		2,964,240		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)			
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing	529	1,055	1,055
	2	Savings and temporary cash investments	2,390,000	2,277,000	2,277,000
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	21,065,923	21,657,765	53,774,624
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	23,456,452	23,935,820	56,052,679	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule).			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ☐ 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 ☒ and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	24,899,561	25,752,678	
	28	Paid-in or capital surplus, or land, bldg, and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	-1,443,109	-1,816,858	
30	Total net assets or fund balances (see instructions)	23,456,452	23,935,820		
31	Total liabilities and net assets/fund balances (see instructions) .	23,456,452	23,935,820		

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	23,456,452
2	Enter amount from Part I, line 27a	2	479,368
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	23,935,820
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	23,935,820

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)			(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a PUBLICLY TRADED SECURITIES			P		
b					
c					
d					
e					

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 6,244,366		3,768,796	2,475,570
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			2,475,570
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	2,475,570
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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 does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see 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	2,110,666	49,490,187	0 042648
2016	2,057,816	43,025,929	0 047827
2015	1,959,045	39,885,153	0 049117
2014	1,884,856	39,980,375	0 047145
2013	1,585,100	39,098,625	0 040541

2 Total of line 1, column (d)	2	0 227278
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	0 045456
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	53,704,740
5 Multiply line 4 by line 3	5	2,441,203
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	29,642
7 Add lines 5 and 6	7	2,470,845
8 Enter qualifying distributions from Part XII, line 4	8	2,403,556

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b	1	59,285
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	59,285
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	59,285
6	Credits/Payments		
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	36,400
b	Exempt foreign organizations—tax withheld at source	6b	
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	36,400
8	Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	133
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	23,018
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 ☐ Refunded ☐	11	

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	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). <i>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</i>	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ \$ _____ (2) On foundation managers ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	2	No
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? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
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? <i>If "Yes," attach the statement required by General Instruction T</i>	5	No
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	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ MA _____		
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 General Instruction G? <i>If "No," attach explanation</i> .	8b	Yes
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 taxable year beginning in 2018? See the instructions for Part XIV. <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	No

Part VII-A Statements Regarding Activities (continued)

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		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>HTTP //MIFFLINMEMORIALFUND.ORG</u>	13	Yes	
14	The books are in care of ▶ <u>LORING WOLCOTT COOLIDGE TRUST LLC</u> Telephone no ▶ <u>(617) 523-6531</u>			

Located at **▶** 230 CONGRESS STREET BOSTON MA ZIP+4 **▶** 02110

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ▶ ☒	15		0
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 ▶	16	Yes	No

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)		Yes	No
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ 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)? ☐ Yes ☒ 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). ☐ Yes ☒ 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. ☐	1b		No
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? ☐	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? ☐ Yes ☒ No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions). ☐	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ 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). ☐	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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?	4b		No

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

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

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

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
LAWRENCE COOLIDGE 230 CONGRESS STREET BOSTON, MA 02110	TRUSTEE 1 00	34,667	0	0
C-F DAVID BOIT 230 CONGRESS STREET BOSTON, MA 02110	TRUSTEE 1 00	34,667	0	0
THOMAS R APPLETON 230 CONGRESS STREET BOSTON, MA 02110	TRUSTEE 1 00	34,685	0	0
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)
3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services. ►		0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 ►	0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	51,879,185
b	Average of monthly cash balances.	1b	2,643,394
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	54,522,579
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	54,522,579
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	817,839
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	53,704,740
6	Minimum investment return. Enter 5% of line 5.	6	2,685,237

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

1	Minimum investment return from Part X, line 6.	1	2,685,237
2a	Tax on investment income for 2018 from Part VI, line 5.	2a	59,285
b	Income tax for 2018 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	59,285
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	2,625,952
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	2,625,952
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	2,625,952

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	1a	2,403,556
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	2,403,556
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	2,403,556

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				2,625,952
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only.			2,260,114	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2018				
a From 2013.				
b From 2014.				
c From 2015.				
d From 2016.				
e From 2017.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ 2,403,556				
a Applied to 2017, but not more than line 2a			2,260,114	
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.				143,442
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a))	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2017 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2018 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2019				2,482,510
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 (see instructions).	0			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2014.				
b Excess from 2015.				
c Excess from 2016.				
d Excess from 2017.				
e Excess from 2018.				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2018, enter the date of the ruling. ▶

b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

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

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

1 Information Regarding Foundation Managers:

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

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

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

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

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

LAWRENCE COOLIDGE
C/OLORINGWOLCOTT COOLIDGE 230
CONGRESS ST
BOSTON, MA 02110
(617) 523-6531

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

WHEN APPLYING SEND THE FOLLOWING PROPOSAL OF ORGANIZATION, FUNDING FOR, AMOUNT, PROJECT BUDGET, RECENT FINACIAL STATEMENTS, IRS EXEMPT STATUS LETTER, ACCURATE FINANCIAL DATA WHICH MEASURE THE SUCCESS OF THE PROGRAM, AND LAST 2 YEARS OF INCOME STATEMENT AND BALANCE SHEET

c Any submission deadlines

DEADLINES FOR APPLICATION AND SUBSEQUENT REPORTING OCTOBER 1ST THROUGH APRIL 15TH

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

THE MIFFLIN FUND GIVES GRANTS PRIMARILY IN THE HUMAN SERVICES AND EDUCATIONAL AREAS, FOCUSING ON LOW INCOME AND MINORITY POPULATIONS. GRANTS ARE ALSO GIVEN TO ENVIRONMENTAL/CONSERVATION ORGANIZATIONS WITH OCCASIONAL GRANTS TO CULTURAL ORGANIZATIONS FOR SPECIAL PURPOSES

Part XV **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			▶ 3a	
b <i>Approved for future payment</i>				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments.					
3 Interest on savings and temporary cash investments			14	56,240	
4 Dividends and interest from securities.			14	626,270	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	2,475,570	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a FOREIGN TAX RECLAIMS 2018 _____			01	8,133	
b _____					
c _____					
d _____					
e _____					
12 Subtotal. Add columns (b), (d), and (e).		0		3,166,213	0
13 Total. Add line 12, columns (b), (d), and (e).			13		3,166,213

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

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

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.	1a(1)		No
(2) Other assets.	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
(3) Rental of facilities, equipment, or other assets.	1b(3)		No
(4) Reimbursement arrangements.	1b(4)		No
(5) Loans or loan guarantees.	1b(5)		No
(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.			

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

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

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

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

Sign Here	*****	2019-10-28	*****	May the IRS discuss this return with the preparer shown below? (see instr)? ☒ Yes ☐ No
	Signature of officer or trustee	Date	Title	

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
	MARY JEAN MOUGHAN				P00133963
	Firm's name ▶ LORING WOLCOTT & COOLIDGE TRUST LLC	Firm's EIN ▶ 27-3396508			
	Firm's address ▶ 230 CONGRESS STREET BOSTON, MA 021102437	Phone no (617) 523-6531			

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ALASKA CONSERVATION FOUNDATION 1227 W 9TH AVENUE SUITE 300 ANCHORAGE, AK 99501	NONE	PC	ALASKA DEFENSE FUND & EXECUTIVE DIRECTORS ROUNDTABLE	40,000
ALASKA MARINE CONSERVATION COUNCIL BOX 101145 ANCHORAGE, AK 99510	NONE	PC	FISHERIES CONVSERVATON PROGRAM	15,000
ALMA DEL MAR CHARTER SCHOOL 26 MADERIA AVE NEW BEDFORD, MA 02746	NONE	PC	COMMUNITY HUB PROJECT	60,000
Total ▶ 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ARGOSY COLLEGIATE CHARTER SCHOOL 263 HAMLET STREET FALL RIVER, MA 02724	NONE	PC	TECH AND FUTURE PLANS	25,000
BERKSHIRE ARTS AND TECHNOLOGY CHARTER PUBLIC SCHOOL ONE COMMERCIAL PLACE ADAMS, MA 01220	NONE	PC	ARTS IN RESIDENCY PROGRAM	10,000
BLESSED STEPHEN BELLESINI OSA ACADEMY PO BOX 1021 LAWRENCE, MA 01842	NONE	PC	STUDENT SPONSORSHIP	40,000
Total ▶ 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BOSTON CASA (COURT APPOINTED SPECIAL ADVOCATES) 715 BOYLSTON STREET SUITE 410 BOSTON, MA 02116	NONE	PC	FOR ADVOCACY FOR ABUUSED AND NEGLECTED CHILDREN	25,000
BOSTON SCHOOL FUND INC 31 HEATH STREET BOSTON, MA 02130	NONE	PC	BOSTON SCHOOL FUNDS	25,000
BOSTON DEBATE LEAGUE 566 COLUMBUS AVENUE BOSTON, MA 02118	NONE	PC	LEADING WITH DEBATE	15,000
Total ▶ 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BOTTOM LINE INC500 ARMORY STREET BOSTON, MA 02130	NONE	PC	MASS OPERATIONS	75,000
BRIDGE BOSTON CHARTER SCHOOL 2 MCLELLAN STREEET BOSTON, MA 02121	NONE	PC	BRIDGE BOSTON TEACHING FELLOW PROGRAM	10,000
BREAD AND ROSES INC 58 NEWBURY STREET LAWRENCE, MA 01840	NONE	PC	GENERAL OPERATIONS	5,000
Total ▶ 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BREAKTHROUGH GREATER BOSTON PO BOX 381486 CAMBRIDGE, MA 02238	NONE	PC	EXPANDING PROGRAMMING, REACH AND IMPACT	10,000
CAREER COLLABORATIVE INC 77 SUMMER STREET 11 FLOOR BOSTON, MA 02110	NONE	PC	CAREER COLLABORATIVE PROGRAMMING	10,000
CASA PROJECT INC100 GROVE STREET WORCESTER, MA 01605	NONE	PC	CHILD COURT ADVOCACY PROGRAM	30,000
Total ▶ 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CHARITY GUILDINC 501 MAIN STREET PO BOX 4856 BROCKTON, MA 02303	NONE	PC	GENERAL OPERATIONS	5,000
CODMAN ACADEMY CHARTER PUBLIC SCHOOL 637 WASHINGTON STREET DORCHESTER, MA 02124	NONE	PC	COMMUNITY ENGAGEMENT	15,000
COMMUNITY CHARTER SCHOOL OF CAMBRIDGE FOUNDATION 245 BENT STREET CAMBRIDGE, MA 02141	NONE	PC	COMMUNITY ENGAGEMENT PROGRAMMING	10,000
Total ▶ 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
COMMUNITY COOKS 337 SOMERVILLE AVE SOMERVILLE, MA 02143	NONE	PC	CORE FOOD SUPPORT AND VOLUNTEER ENGAGEMENT PROGRAM	5,000
COMMUNITY GROUP 190 HAMPSHIRE STREET LAWRENCE, MA 01840	NONE	PC	FAMILY CONNECTIONS	15,000
COMMUNITY LEGAL SERVICES AND COUNSELING CENTER 47 THORNDIKE STREET SB-LL-I CAMBRIDGE, MA 02141	NONE	PC	FREE LEGAL SERVICES FOR LOW-INCOME PEOPLE	40,000
Total ▶ 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CONSERVATORY LAB CHARTER SCHOOL 2120 DORCHESTER AVE DORCHESTER, MA 02124	NONE	PC	CAPTTAL CAMPAIGN, PERMANENT HOME IN UPHAMS CORNER, EL SISTEMA	95,000
CONSERVATION LAW FOUNDATION 62 SUMMER STREET BOSTON, MA 02110	NONE	PC	NORTH ATLANTIC RIGHT WHALE AND ATLANTIC COD EMERGENCY CAMPAIGN	100,000
CRISTO REY BOSTON HIGH SCHOOL 100 SAVING HILL AVENUE BOSTON, MA 02125	NONE	PC	NON-PROFIT CORPORATE WORK STUDY PLACEMENTS	10,000
Total ► 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
DISMAS HOUSE OF MASSACHUSETTS INC PO BOX 30125 WORCESTER, MA 01603	NONE	PC	FOR BAR NONE	25,000
DOWNEAST LAKES LAND TRUST 9 BROWN LANE GRANDLAKE STREAM, ME 04668	NONE	PC	DLLT HEADQUARTERS PROJECT	10,000
EDUCATORS FOR EXCELLENCE-BOSTON 121 EAST BERKELEY STREET FLOOR 2 BOSTON, MA 02118	NONE	PC	ELEVATING EDUCATOR VOICE	100,000
Total ▶ 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ESSEX COUNTY GREENBELT ASSOCIATION 82 EASTERN AVENUE ESSEX, MA 01929	NONE	PC	DONIBRISTLE FARM CONSERVATION PROJECT	25,000
FATHER BILLS AND MAINSPRING INC 430 BELMONT STREET BROCKTON, MA 02301	NONE	PC	TRIAGE PROJECT	10,000
FOOD FOR FREE COMMITTEE INC 11 INMAN STREET CAMBRIDGE, MA 02139	NONE	PC	FOOD RESCUE, DISTRIBUTION PROGRAM	10,000
Total ▶ 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
FOOD FOR THE WORLD INC 516 ESSEX STREET LAWRENCE, MA 01840	NONE	PC	FEEDING THE HUNGER	15,000
FOOD LINK INC17 BRATTLE STREET 17 ARLINGTON, MA 02476	NONE	PC	FOOD DELIVERIES TO UNDERSERVED COMMUNITIES	30,000
GIRLSTART738 MAIN STREET 391 WALTHAM, MA 02451	NONE	PC	AFTER SCHOOL AND SUMMER CAMP FOR HIGH NEED GIRLS IN BOSTON	10,000
Total ▶ 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
GREATER BOSTON LEGAL SERVICES 197 FRIEND STREET BOSTON, MA 02114	NONE	PC	KNOWLEDGE MANAGEMENT INTEGRATION PROJECT	100,000
HAVEN PROJECT57 MUNROE STREET LYNN, MA 01901	NONE	PC	FOR DROP IN CENTER	10,000
HOUSEHOLD GOODS INC 530 MAIN STREET ACTON, MA 01720	NONE	PC	FOR HOUSEHOLD GOODS, INC	10,000
Total ▶ 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
HYDE SQUARE TASK FORCE PO BOX 301871 JAMAICA PLAIN, MA 02130	NONE	PC	JOVENES EN ACCION AND COLLEGE SUCCESS PROGRAMS	15,000
IMMIGRANT FAMILY SERVICES INSTITUTE-USA 575 AMERICAN LEGION HIGHWAY ROSLINDALE, MA 02131	NONE	PC	IFSI PLUS SCHOLARS INTITIATIVE	20,000
IRISH INTERNATIONAL IMMIGRATION CENTER 100 FRANKLIN STREET LL-1 BOSTON, MA 02110	NONE	PC	FOR IMMIGRATION LEGAL SERVICES	10,000
Total ▶ 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
JAMAICA PLAIN NEIGHBORHOOD DEVELOPMENT CORPORATION 31 GERMANIA STREET JAMAICA PLAIN, MA 02130	NONE	PC	SUPPORT FOR AFFORDABLE HOUSING	25,000
JFY NETWORKS 44 SCHOOL STREET SUITE 1010 BOSTON, MA 02108	NONE	PC	FOR JFYNET COLLEGE READINESS	35,000
JUST-A-START CORPORATION 1035 CAMBRIDGE STREET CAMBRIDGE, MA 02141	NONE	PC	EDUCATION AND TRAINING AND HOMELESSNESS PREVENTION PROGRAMS	50,000
Total ▶ 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
KESTREL LAND TRUSTPO BOX 1016 AMHERST, MA 01004	NONE	PC	WEST PELHAM FOREST CONSERVATION	10,000
KIPP MASSACHUSETTS 90 HIGH ROCK STREET LYNN, MA 01902	NONE	PC	FAMILY AND COMMUNITY ENGAGEMENT	30,000
LA VIDA INC40 GREEN STREET LYNN, MA 01902	NONE	PC	FOR CLOSING THE ADMISSION GAP IN LYNN, MA	25,000
Total ▶ 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
LAWRENCE FAMILY DEVELOPMENT AND EDUCATION FUND INC 34 WEST STREET LAWRENCE, MA 01841	NONE	PC	OPENING DOORS PROGRAM	30,000
LAWYERS CLEARINGHOUSE ON AFFORDABLE HOUSING AND HOMELESSNESS INC 16 BEACON STREET BOSTON, MA 02108	NONE	PC	THE MA LEGAL CLINIC FOR THE HOMELESS	15,000
LAZARUS HOUSE INCPO BOX 408 LAWRENCE, MA 01841	NONE	PC	EDUCATION AND WORK PREPARATION PROGRAM	10,000
Total ▶ 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
LETS GET READY 89 SOUTH STREET SUITE 401 BOSTON, MA 02111	NONE	PC	GREATER BOSTON ACCESS PROGRAMS	10,000
LONGY SCHOOL OF MUSIC OF BARD COLLEGE ONE FOLLEN STREET CAMBRIDGE, MA 02138	NONE	PC	SISTEMA SIDE BY SIDE SERIES	5,000
LOWELL COMMUNITY CHARTER PUBLIC SCHOOL 206 JACKSON STREET LOWELL, MA 01852	NONE	PC	SUMMER ELL PROGRAM	6,000
Total ▶ 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MASSACHUSETTS CHARTER PUBLIC SCHOOL ASSOCIATION 43 BROAD STREET SUITE C 401 HUDSON, MA 01749	NONE	PC	SUCCESS 2017-2022 PARTNERSHIP WITH BOTTOM LINE	200,000
MASSACHUSETTS PARENTS UNITED PO BOX 6075 FALL RIVER, MA 02724	NONE	PC	GENERAL	100,000
MATCH FOUNDATION INC 50 MILK STREET 6TH FLOOR BOSTON, MA 02109	NONE	PC	MATCH SCHOOL HOUSE	75,000
Total ▶ 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MERRIMACK VALLEY FOOD BANKINC 735 BROADWAY STREET LOWELL, MA 01854	NONE	PC	FOOD RESCUE	10,000
MERRIMACK VALLLEY HOUSING PARTNERSHIP PO BOX 1042 LOWELL, MA 01853	NONE	PC	PROJECT GENESIS, HOME BUYER TRAINING	10,000
METROWEST LEGAL SERVICES 63 FOUNTAIN STREET SUITE 304 FRAMINGHAM, MA 01702	NONE	PC	FREE LEGAL SERIVICES FOR LOW INCOME INDIVIDUALS	15,000
Total ▶ 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MORE THAN WORDS56 FELTON STREET WALTHAM, MA 02453	NONE	PC	GENERAL OPERATING SUPPORT	20,000
MUJERES UNIDAS AVANZANDO 54 CLAYTON STREET DORCHESTER, MA 02122	NONE	PC	TECHNOLOGY UPDATE	15,000
NEIGHBORHOOD DEVELOPERS 4 GERRISH AVENUE CHELSEA, MA 02150	NONE	PC	CHELSEA SQUARE REVITALIZATION	15,000
Total ▶ 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
NEIGHBORHOOD OF AFFORDABLE HOUSING INC 143 BORDER STREET EAST BOSTON, MA 02128	NONE	PC	SUPPORT FOR AFFORDABLE HOUSING	10,000
NEW ENGLAND FORESTRY FOUNDATION INC 32 FOSTER STREET PO BOX 1346 LITTLETON, MA 01460	NONE	PC	DOWNEAST WOODS AND WILDLIFE	25,000
NOTRE DAME CRISTO REY HIGH SCHOOL 303 HAVERHILL STREET LAWRENCE, MA 01841	NONE	PC	GENERAL OPERATING SUPPORT	10,000
Total ▶ 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
PHOENIX CHARTER ACADEMY NETWORK 60 CANAL STREET 4TH FLOOR BOSTON, MA 02114	NONE	PC	EVOLUTIONARY MODEL DESIGN & CAPITAL ALTERATIONS	30,000
POLITICAL ASYLUMIMMIGRATION REPRESENTATION PROJECT INC 98 N WASHINGTON STREET SUITE 2016 BOSTON, MA 02114	NONE	PC	ACCESS TO JUSTICE FOR IMMIGRANTS	10,000
PROJECT CITIZENSHIP 4 FANEUIL SOUTH MARKET BUILDING 3RD FL SUITE 4025 BOSTON, MA 02109	NONE	PC	PROJECT CITIZENSHIP FOR IMMIGRANT OUTREACH	10,000
Total ▶ 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
PROSPECT HILL ACADEMY CHARTER SCHOOL 50 ESSEX STREET CAMBRIDGE, MA 02139	NONE	PC	COMMUNITY ENGAGEMENT PROGRAM	25,000
RAW ART WORKS37 CENTRAL SQUARE LYNN, MA 01901	NONE	PC	FREE ART THERAPY BASED PROGRAMMING	10,000
REACH BEYOND DOMESTIC VIOLENCE PO BOX 540024 WALTHAM, MA 02454	NONE	PC	GENERAL OPERATING	10,000
Total ► 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
REFUGEE AND IMMIGRANT ASSISTANCE CENTER 253 ROXBURY STREET BOSTON, MA 02119	NONE	PC	COMPUTER LITERACY INITIATIVE	10,000
RESPOND INCPO BOX 555 SOMERVILLE, MA 02143	NONE	PC	GENERAL OPERATING SUPPORT	15,000
SCIENCE FROM SCIENTISTS 1 DEANGELO DRIVE SUITE C BEDFORD, MA 01730	NONE	PC	ISBM STEM ENRICHMENT PROGRAM IN BOSTON	10,000
Total ▶ 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SITKA CONSERVATION SOCIETY PO BOX 6533 SITKA, AK 99835	NONE	PC	FOR TONGASS NATIONAL FOREST PROTECTION	50,000
SOUTHEAST ALASKA CONSERVATION COUNCIL 419 6TH STREET SUITE 200 JUNEAU, AK 99801	NONE	PC	KEEPING THE TONGASS INTACT	30,000
SPRINGFIELD PREPARATORY CHARTER SCHOOL 594 CONVERSE STREET LONGMEADOW, MA 01106	NONE	PC	INSTRUCTIONAL TECHNOLOGY FOR 5TH GRADE GROWTH	10,000
Total ▶ 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ST FRANCIS HOUSE 39 BOYLSTON STREET BOSTON, MA 02116	NONE	PC	BASIC CORE SERVICES	25,000
TEACH FOR AMERICA - MASSACHUSETTS 60 CANAL STREET 5TH FLOOR BOSTON, MA 02114	NONE	PC	MOMENTUM FOR EDUCATIONAL EQUITY IN MASSACHUSETTS	75,000
TRUSTEES FOR ALASKA 1026 WEST FOURTH AVE SUITE 201 ANCHORAGE, AK 99501	NONE	PC	ENVIORNMENTAL LEGAL SERVICEES FOR ALASKAS CONERVATION COMMUNITY	25,000
Total ► 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
TUTORING PLUS OF CAMBRIDGE INC 225 WINDSOR STREET CAMBRIDGE, MA 02139	NONE	PC	OPERATING SUPPORT	15,000
UTEC INC15 WARREN STREET NO 3 LOWELL, MA 01852	NONE	PC	ALTERNATIVE EDUCATION CONTINUUM FOR PROVEN-RISK YOUTH	10,000
VETERANS LEGAL SERVICES PO BOX 8457 BOSTON, MA 02114	NONE	PC	PRO BONO ATTORNEY PROGRAM	15,000
Total ► 3a				2,331,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
VOLUNTEER LAWYERS PROJECT OF THE BOSTON BAR ASSOCIATION 99 CHAUNCY STREET BOSTON, MA 02111	NONE	PC	ERLI	60,000
WELLSPRING HOUSE INC 302 ESSEX AVENUE GLOUCESTER, MA 01930	NONE	PC	MEDICLERK JOB TRAINING & PLACEMENT PROGRAM	15,000
YOUTH DEVELOPMENT ORGANIZATION INC 15 UNION STREET SUITE 563 LAWRENCE, MA 01840	NONE	PC	YDO STEM	25,000
Total ▶ 3a				2,331,000

TY 2018 Accounting Fees Schedule**Name:** GEORGE H & JANE A MIFFLIN MEMORIAL FUND**EIN:** 04-6384983

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LORING WOLCOTT & COOLIDGE TRUST LLC	33,946	33,946		0

TY 2018 General Explanation Attachment**Name:** GEORGE H & JANE A MIFFLIN MEMORIAL FUND**EIN:** 04-6384983**General Explanation Attachment**

Identifier	Return Reference	Explanation	
1		PART VIII LINE 1(B)	990PF STATEMENTPART VIII OFFICERS, DIRECTORS, TRUSTEES, FOUNDATION MANAGERSAND THEIR COMPENSATION AND HOURS SPENT PER WEEK HOURS SPENT THE TIME SPENT BY THE TRUSTEE/S MANAGING THE AFFAIRS OF THEFOUNDATION VARIES FROM WEEK TO WEEK AND YEAR TO YEAR FOR990PF REPORTING PURPOSES, AN ESTIMATE OF 5 TO 1 HOURS PERWEEK HAS BEEN INDICATED THE TRUSTEE/S ARE PROFESSIONALFIDUCIARIES WHO MANAGE A NUMBER OF TRUST/FOUNDATIONRELATIONSHIPS AND WHO EMPLOY ACCOUNTING, SUPPORT AND TAXCOMPLIANCE STAFF TO ASSIST WITH THE ADMINISTRATION OF SAIDRELATIONSHIPS THE 5 TO 1 HOUR TIME NOTED REFLECTS ANESTIMATE OF THE TIME SPENT BY THE NAMED TRUSTEE/S AS WELL ASTHEIR AGENTS OR EMPLOYS THE ACTUAL TIME SPENT MAY DIFFERFROM THE ESTIMATE IN ANY GIVEN WEEK/YEAR THE TRUSTEES FEES NOTED ALSO INCLUDES AN INVESTMENT ADVISORY COMPONENT WHICH IS BASED IN PART ON THE FOUNDATION INVESTMENTASSETS AND WHICH VARIES FROM QUARTER TO QUARTER BASED ONFAIR MARKET VALUE

TY 2018 Investments Corporate Stock Schedule

Name: GEORGE H & JANE A MIFFLIN MEMORIAL FUND
EIN: 04-6384983

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
25,621 SHS ABBOTT LABORATORIES	651,326	2,143,709
9,996 SHS AUTOMATIC DATA PROCESSING	37,843	1,613,554
7,600 SHS STRYKER CORP	25,412	1,643,880
4,400 SHS STRYKER CORP	26,469	951,720
16,550 SHS HEINEKEN HOLDING NV	806,867	1,648,216
17,305 SHS DANAHER CORP SHS BEN INT	545,590	2,499,361
17,840 SHS CANADIAN NATIONAL RAILWAY	464,221	1,603,102
23,200 SHS JARDINE MATHESON HOLDINGS LTD	580,431	1,241,200
7,500 SHS BERKSHIRE HATHAWAY INC CL B	438,098	1,560,150
12,050 SHS PHILIP MORRIS INTERNATIONAL	556,847	914,957
15,875 SHS CHURCH & DWIGHT CO	255,758	1,194,435
8,110 SHS COLGATE PALMOLIVE CO	317,611	596,166
22,895 SHS FISERV INC	267,594	2,371,693
21,130 SHS MASTERCARD INC	446,701	5,738,274
39,890 SHS TJX COMPANIES	444,398	2,223,469
18,100 SHS EOG RESOURCES	744,556	1,343,382
9,555 SHS ECOLAB INC	660,550	1,892,272
8,755 SHS INTUIT	510,329	2,328,305
23,480 SHS OCCIDENTAL PETROLEUM CORP	1,682,851	1,044,156
15,830 SHS UNILEVER PLC SPONSORED ADR	511,138	951,383
11,935 SHS WEX INC	1,107,036	2,411,705
14,250 SHS AMERICAN TOWER CORP	1,354,509	3,151,103
1,530 SHS ALPHABET INC CL-A	1,207,090	1,868,344
5,885 SHS FACEBOOK INC	800,666	1,048,001
9,412 SHS FORTIVE CORP	196,205	645,287
8,655 SHS PAYCOM SOFTWARE INC	501,467	1,813,136
960 SHS NASPERS LIMITED	195,067	145,309
820 SHS AMAZON.COM	1,462,142	1,423,446
3,345 SHS BECTON DICKINSON	752,566	846,151
15,585 SHS MICROSOFT CORP	1,751,782	2,166,783

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
4,315 SHS ADOBE SYSTEMS INC	1,204,137	1,192,019
2,855 SHS MSCI INC	499,704	621,676
6,145 SHS VEEVA SYSTEMS INC	650,804	938,280

TY 2018 Other Expenses Schedule**Name:** GEORGE H & JANE A MIFFLIN MEMORIAL FUND**EIN:** 04-6384983**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FILING FEE - COMM OF MA FORM PC ANNUAL REPORT	250	0		250
SUFFOLK PROBATE 52TH ACCOUNT	3,500	0		3,500
AGENT FEE	237	237		0

TY 2018 Other Income Schedule

Name: GEORGE H & JANE A MIFFLIN MEMORIAL FUND

EIN: 04-6384983

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
FOREIGN TAX RECLAIMS 2018	8,133		8,133

TY 2018 Other Professional Fees Schedule**Name:** GEORGE H & JANE A MIFFLIN MEMORIAL FUND**EIN:** 04-6384983

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LWC TAX PREPARATION	2,600	0		2,600
LWC FIDUCIARY ADVISORS FEES	75,325	75,325		0
LWC FIDUCIARY ADVISORS ADMINISTRATIVE SERVICES	35,000	0		35,000

TY 2018 Taxes Schedule**Name:** GEORGE H & JANE A MIFFLIN MEMORIAL FUND**EIN:** 04-6384983

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL EXCISE BLANCE TAX PAID 9/30/2018	52,153	0		0
ESTIMATED FEDERAL EXCISE TAX FOR 9/30/19	36,400	0		0
FOREIGN TAXES WITHHELD	12,415	12,415		0