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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* for instructions and the latest information.

OMB No 1545-0052

2019

Open to Public Inspection

For calendar year 2019, or tax year beginning 01-01-2019 , and ending 12-31-2019

Name of foundation
MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION

A Employer identification number
04-2023566

Number and street (or P O box number if mail is not delivered to street address) 353 SOUTHERN ARTERY
Room/suite

B Telephone number (see instructions)
(617) 479-1795

City or town, state or province, country, and ZIP or foreign postal code
QUINCY, MA 021692210

C If exemption application is pending, check here ▶ ☐

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☑ Amended return ☐ Address change ☐ Name 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*) ▶$ 5,342,691

J Accounting method ☐ Cash ☑ Accrual ☐ Other (specify)
(Part I, column (d) must be on cash basis)

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

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))*

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	46,500			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	1	1		
	4	Dividends and interest from securities	70,477	70,477		
	5a	Gross rents	13,200			
	b	Net rental income or (loss) -9,064				
	6a	Net gain or (loss) from sale of assets not on line 10	196,358			
	b	Gross sales price for all assets on line 6a 2,295,506				
	7	Capital gain net income (from Part IV, line 2)		199,108		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)	1,044			
	12	**Total.** Add lines 1 through 11	327,580	269,586		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc				
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits	20,200	1,010		4,040
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	31,184	15,592		
	c	Other professional fees (attach schedule)	29,346	29,346		
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	2,271	2,221		
	19	Depreciation (attach schedule) and depletion	14,213			
	20	Occupancy	17,538			5,698
	21	Travel, conferences, and meetings				
	22	Printing and publications	13,509	2,026		8,105
	23	Other expenses (attach schedule)	41,455	5,151		24,604
	24	**Total operating and administrative expenses.** Add lines 13 through 23	169,716	55,346		42,447
	25	Contributions, gifts, grants paid	258,663			258,663
	26	**Total expenses and disbursements.** Add lines 24 and 25	428,379	55,346		301,110
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-100,799			
	b	**Net investment income** (if negative, enter -0-)		214,240		
	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	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	6,640	52,476	52,476
	2	Savings and temporary cash investments	181,129	58,187	58,187
	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	1,500	1,700	1,700
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	2,596,441	2,569,557	3,455,057
	c	Investments—corporate bonds (attach schedule)	1,081,871	1,018,980	1,146,747
	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 ▶ 628,524			
		Less accumulated depreciation (attach schedule) ▶ 403,426	176,495	225,098	628,524
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	4,044,076	3,925,998	5,342,691
Liabilities	17	Accounts payable and accrued expenses	2,878	10,225	
	18	Grants payable			
	19	Deferred revenue		2,200	
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)	20,340	2,200	
	23	**Total liabilities**(add lines 17 through 22)	23,218	14,625	
Net Assets or Fund Balances		**Foundations that follow FASB ASC 958, check here ▶** ☑ **and complete lines 24, 25, 29 and 30.**			
	24	Net assets without donor restrictions	3,468,229	3,440,582	
	25	Net assets with donor restrictions	552,629	470,791	
		Foundations that do not follow FASB ASC 958, check here ▶ ☐ **and complete lines 26 through 30.**			
	26	Capital stock, trust principal, or current funds			
	27	Paid-in or capital surplus, or land, bldg , and equipment fund			
	28	Retained earnings, accumulated income, endowment, or other funds			
	29	**Total net assets or fund balances** (see instructions)	4,020,858	3,911,373	
	30	**Total liabilities and net assets/fund balances** (see instructions)	4,044,076	3,925,998	

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 29 (must agree with end-of-year figure reported on prior year's return)	1	4,020,858
2	Enter amount from Part I, line 27a	2	-100,799
3	Other increases not included in line 2 (itemize) ▶	3	1,008
4	Add lines 1, 2, and 3	4	3,921,067
5	Decreases not included in line 2 (itemize) ▶	5	9,694
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	3,911,373

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)
1a	See Additional Data Table			
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	See Additional Data Table			
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	See Additional Data Table			
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	199,108
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))
2018	329,031	5,341,618	0 061598
2017	270,052	5,395,767	0 050049
2016	268,449	4,758,326	0 056417
2015	195,551	4,708,700	0 041530
2014	204,807	4,707,839	0 043503

2	**Total** of line 1, column (d)	2	0 253097
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 050619
4	Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	4,942,954
5	Multiply line 4 by line 3	5	250,207
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	2,142
7	Add lines 5 and 6	7	252,349
8	Enter qualifying distributions from Part XII, line 4	8	301,110

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	2,142
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	
3	Add lines 1 and 2	3	2,142
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	2,142
6	Credits/Payments		
a	2019 estimated tax payments and 2018 overpayment credited to 2019 — 6a		
b	Exempt foreign organizations—tax withheld at source — 6b		
c	Tax paid with application for extension of time to file (Form 8868) — 6c — 2,200		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments Add lines 6a through 6d	7	2,198
8	Enter any **penalty** for underpayment of estimated tax Check here ☑ if Form 2220 is attached	8	56
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
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 2020 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)	1b		No
	*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*			
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? *If "Yes," attach a detailed description of the activities*	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? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a	Yes	
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b	Yes	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	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? *If "Yes," complete Part II, col (c), and Part XV*	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? *If "No," attach explanation*	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 2019 or the taxable year beginning in 2019? See the instructions for Part XIV If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		No

Part VII-A Statements Regarding Activities (continued)

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule See instructions.	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?	13	Yes	

Website address ▶N/A

14 The books are in care of ▶THE ORGANIZATION Telephone no ▶(617) 479-1795

Located at ▶353 SOUTHERN ARTERY QUINCY MA ZIP+4 ▶021692210

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 . . . ▶ | 15 |

			Yes	No
16	At any time during calendar year 2019, 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?	16		No
	See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes", enter the name of the foreign country ▶			

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. Yes No

1a During the year did the foundation (either directly or indirectly)

(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ 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 | | |

Organizations relying on a current notice regarding disaster assistance check here. . . . ▶ ☐

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 2019?. . . | 1c | | |

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 2019, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2019?. ☐ 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 2019 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 2019).* . . . | 3b | | |

			Yes	No
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 2019?	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		
	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? ☐ Yes ☐ 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? ☐ 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
See Additional Data Table				

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

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

Total number of other employees paid over $50,000. ▶

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

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

Total number of others receiving over $50,000 for professional services. . . . . ▶

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 DIRECT CONTRIBUTIONS TO NONPROFIT ORGANIZATIONS WHO PROMOTE THE TRADES OR TRAIN TRADESMAN, INCLUDING THOSE WITH PHYSICAL AND DEVELOPMENTAL DISABILITIES FOR EMPLOYMENT	251,913
2 RELIEF DISTRIBUTIONS	2,750
3 SCHOLARSHIPS TO MEMBER'S FAMILY UPON APPROVAL OF THE BOARD	4,000
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 N/A	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3 . . . . ▶	

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	4,458,925
b	Average of monthly cash balances	1b	217,859
c	Fair market value of all other assets (see instructions)	1c	341,443
d	**Total** (add lines 1a, b, and c)	1d	5,018,227
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	5,018,227
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	75,273
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	4,942,954
6	**Minimum investment return.** Enter 5% of line 5	6	247,148

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	247,148
2a	Tax on investment income for 2019 from Part VI, line 5	2a	2,142		
b	Income tax for 2019 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	2,142
3	Distributable amount before adjustments Subtract line 2c from line 1			3	245,006
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	245,006
6	Deduction from distributable amount (see instructions)			6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1			7	245,006

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	301,110
b	Program-related investments—total from Part IX-B	1b	
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	301,110
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	2,142
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	298,968

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 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				245,006
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only.			78,449	
b Total for prior years 20___ , 20___ , 20___				
3 Excess distributions carryover, if any, to 2019				
a From 2014.				
b From 2015.				
c From 2016.				
d From 2017.				
e From 2018.				
f **Total** of lines 3a through e.				
4 Qualifying distributions for 2019 from Part XII, line 4 ▶ $ 301,110				
a Applied to 2018, but not more than line 2a			78,449	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2019 distributable amount.				222,661
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2019 *(If an amount appears in column (d), the same amount must be shown in column (a))*				
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount —see instructions				
e Undistributed income for 2018 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2019 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2020				22,345
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)				
8 Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions) . . .				
9 **Excess distributions carryover to 2020.** Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2015. . . .				
b Excess from 2016. . . .				
c Excess from 2017. . . .				
d Excess from 2018. . . .				
e Excess from 2019. . . .				

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 2019, 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) 2019	**(b)** 2018	**(c)** 2017	**(d)** 2016	
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

KURT E HANSON
353 SOUTHERN ARTERY
QUINCY, MA 02169
(617) 479-1795

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

IN WRITING, NO FORMAL APPLICATION IS REQUIRED

c Any submission deadlines

NONE

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

NONE

Part XV **Supplementary Information** (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

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
a *Paid during the year* See Additional Data Table				
Total . . . . ▶ **3a**				258,663
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

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	1	
4 Dividends and interest from securities			14	70,477	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property	531120	-9,064			
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	199,108	-2,750
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a CLASS ACTION PROCEEDS					1,044
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)		-9,064		269,586	-1,706

13 Total. Add line 12, columns (b), (d), and (e) **13** 258,816

(See worksheet in line 13 instructions to verify calculations)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt 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) (See instructions)

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

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501 (c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.	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

Sign Here

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

****** | 2020-07-23 | ******

Signature of officer or trustee | Date | Title

May the IRS discuss this return with the preparer shown below (see instr) ☑ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶ ☐	PTIN
JOSEPH B MORIARTY CPA		2020-07-27		P00043600
Firm's name ▶ KING MCNAMARA MORIARTY LLP				Firm's EIN ▶04-2686846
Firm's address ▶ 473 WASHINGTON STREET NORWOOD, MA 020622330				Phone no (781) 769-6300

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
45,974 87 STATE STREET INSTL US GOVT	P		2019-01-23
3,283 36SHS ABERDEEN EMERGING MKTS	P		2019-10-18
733SHS SPDR DOW JONES REIT ETF	P		2019-11-19
32,820 63SHS STATE ST INSTL US GOVT	P		2019-04-12
476 078SHS TREASURY INFLATION	P		2019-08-30
54 925SHS ABERDEEN EMERGING MKTS	P		2019-08-19
52 948SHS SSGA INTL STOCK SELECTION	P		2019-07-17
23 95SHS STATE ST INSTL US GOVT MKT	P		2019-11-25
411 086SHS ABERDEEN EMERGING MKT	P		2019-06-12
13SHS SPDR DOW JONES REIT	P		2019-07-17

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
45,975		45,975	
50,038		45,125	4,913
76,400		68,804	7,596
32,821		32,821	
7,455		6,686	769
806		756	50
541		517	24
24		24	
6,142		5,640	502
1,315		1,133	182

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			4,913
			7,596
			769
			50
			24
			502
			182

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
7,324 95SHS STATE ST INSTL US GOVT	P		2019-11-21
2,160 52 STATE STREET INSTL US GOVT	P		2019-02-25
6,782 431SHS BLACKROCK FDS	P		2019-01-14
165SHS SPDR S&P INTL SMALL CAP	P		2019-04-11
51,900 72SHS STATE ST INSTL US GOVT	P		2019-05-23
580 17SHS STATE ST INSTL US GOVT MKT	P		2019-01-23
36 903SHS ABERDEEN EMERGING MKTS	P		2019-10-18
79 246SHS SSGA INTL STOCK SELECTION	P		2019-08-19
14 001SHS TREASURY INFLATION PROTECT	P		2019-01-15
200 144SHS ABERDEEN EMERGING MKT	P		2019-07-17

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
7,325		7,325	
2,161		2,161	
49,783		51,927	-2,144
5,074		5,209	-135
51,901		51,901	
580		580	
562		508	54
762		774	-12
202		196	6
3,134		2,746	388

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			-2,144
			-135
			54
			-12
			6
			388

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
74SHS SPDR DOW JONES REIT	P		2019-11-20
5,888 29SHS STATE ST INSTL US GOVT	P		2019-11-22
2,342 16 STATE STREET INSTL US GOVT	P		2019-03-22
10,671SHS BLACKROCK FDS	P		2019-08-19
506SHS SPDR S&P INTL SMALL CAP	P		2019-11-19
10,254 03SHS STATE ST INSTL US GOVT	P		2019-05-28
27 29SHS STATE ST INSTL US GOVT MKT	P		2019-02-25
77 21SHS BLACKROCK FDS	P		2019-01-14
26 135SHS STATE STR INSTL FDS	P		2019-01-14
13 967SHS TREASURY INFLATION PROTECT	P		2019-07-18

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
7,669		6,920	749
5,888		5,888	
2,342		2,342	
81,313		81,586	-273
15,787		15,857	-70
10,254		10,254	
27		27	
567		591	-24
404		497	-93
213		196	17

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			749
			-273
			-70
			-24
			-93
			17

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
469 359SHS ABERDEEN EMERGING MKT	P		2019-08-19
4SHS SPDR S&P MIDCAP 400 ETF	P		2019-07-17
470 5SHS STATE ST INSTL US GOVT	P		2019-11-25
1,260 17 STATE STREET INSTL US GOVT	P		2019-04-23
1,554SHS IPATH BLOOMBERG COMMODITY	P		2019-10-18
2,074 031SHS SSGA INTL STOCK SELECT	P		2019-04-11
42,892 73SHS STATE ST INSTL US GOVT	P		2019-06-14
29 85SHS STATE ST INSTL US GOVT MKT	P		2019-03-22
31SHS BLACKROCK FDS	P		2019-07-17
11 097SHS STATE STR INSTL FDS	P		2019-07-17

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
6,886		6,440	446
1,415		899	516
471		471	
1,260		1,260	
34,283		37,370	-3,087
21,342		19,951	1,391
42,893		42,893	
30		30	
237		237	
189		211	-22

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			446
			516
			-3,087
			1,391
			-22

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
4,948 81SHS STATE ST INSTL US GOVT	P		2019-01-23
316 168SHS ABERDEEN EMERGING MKT	P		2019-10-18
393 614SHS SSGA INTL STOCK SELECTION	P		2019-07-17
94 006SHS TREASURY INFLATION PROTECT	P		2019-01-15
1,882 3 STATE STREET INSTL US GOVT	P		2019-05-23
5,215 588SHS PASSIVE BOND MKT	P		2019-01-07
6,802 147SHS SSGA INTL STOCK SELECT	P		2019-08-19
7,343 11SHS STATE ST INSTL US GOVT	P		2019-06-24
16 34SHS STATE ST INSTL US GOVT MKT	P		2019-04-23
141SHS BLACKROCK FDS	P		2019-08-19

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
4,949		4,949	
4,818		4,338	480
4,023		3,820	203
1,354		1,312	42
1,882		1,882	
82,516		74,220	8,296
65,437		65,509	-72
7,343		7,343	
16		16	
1,074		1,078	-4

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			480
			203
			42
			8,296
			-72
			-4

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
710 33SHS STATE STR INSTL US GOVT MK	P		2019-01-16
233 79SHS STATE ST INSTL US GOVT MKT	P		2019-02-25
660 796SHS BLACKROCK FDS	P		2019-01-14
665 068SHS SSGA INTL STOCK SELECTION	P		2019-08-19
106 748SHS TREASURY INFLATION PROTEC	P		2019-07-18
1,557 54 STATE STREET INSTL US GOVT	P		2019-06-21
1,342 721SHS PASSIVE BOND MKT	P		2019-04-12
951 036SHS SSGA INTL STOCK SELECT	P		2019-08-29
60,000SHS STATE ST INSTL US GOVT	P		2019-07-22
24 91SHS STATE ST INSTL US GOVT MKT	P		2019-05-23

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
710		710	
234		234	
4,850		5,073	-223
6,398		6,454	-56
1,631		1,494	137
1,558		1,558	
21,739		19,497	2,242
9,158		9,159	-1
60,000		60,000	
25		25	

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			-223
			-56
			137
			2,242
			-1

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
27SHS IPATH BLOOMBERG COMMODITY	P		2019-10-18
344 68SHS STATE ST INSTL US GOVT MKT	P		2019-03-05
255 65SHS STATE ST INSTL US GOVT MKT	P		2019-03-22
233SHS BLACKROCK FDS	P		2019-07-17
207 067SHS STATE ST INSTL FDS	P		2019-01-14
5,707 44 STATE STREET INSTL US GOVT	P		2019-07-23
1,361 79SHS PASSIVE BOND MKT	P		2019-08-30
2,416 456SHS STATE STR INSTL FDS	P		2019-01-14
80,984 92SHS STATE ST INSTL US GOVT	P		2019-08-21
19 89SHS STATE ST INSTL US GOVT MKT	P		2019-06-21

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
596		645	-49
345		345	
256		256	
1,782		1,785	-3
3,197		3,955	-758
5,707		5,707	
23,477		19,840	3,637
37,310		45,918	-8,608
80,985		80,985	
20		20	

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			-49
			-3
			-758
			3,637
			-8,608

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
8 962SHS PASSIVE BOND MKT	P		2019-05-23
1,676 7SHS STATE ST INSTL US GOVT MK	P		2019-04-15
140 56SHS STATE ST INSTL US GOVT MKT	P		2019-04-23
1,202SHS BLACKROCK FDS	P		2019-08-19
83 731SHS STATE ST INSTL FDS	P		2019-07-17
2,249 14 STATE STREET INSTL US GOVT	P		2019-08-23
265 57SHS S&P 500 COMMON TRUST	P		2019-01-15
670 218SHS STATE STR INSTL FDS	P		2019-04-11
90,000SHS STATE ST INSTL US GOVT	P		2019-09-05
75 04SHS STATE ST INSTL US GOVT MKT	P		2019-07-22

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
147		129	18
1,677		1,677	
141		141	
9,159		9,209	-50
1,425		1,599	-174
2,249		2,249	
34,759		17,490	17,269
11,501		12,736	-1,235
90,000		90,000	
75		75	

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			18
			-50
			-174
			17,269
			-1,235

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
26 879SHS PASSIVE BOND MKT	P		2019-07-18
496 18SHS STATE ST INSTL US GOVT MKT	P		2019-05-23
206 91SHS STATE ST INSTL US GOVT MKT	P		2019-05-23
191SHS IPATH BLOOMBERG COMMODITY	P		2019-10-18
4,294 1SHS STATE ST INSTL US GOVT MK	P		2019-01-16
1,383 91 STATE STREET INSTL US GOVT	P		2019-09-23
84 608SHS S&P 500 COMMON TRUST	P		2019-03-01
90,000SHS STATE ST INSTL US GOVT	P		2019-01-04
5,938 38SHS STATE ST INSTL US GOVT	P		2019-09-23
105 53SHS STATE ST INSTL US GOVT MKT	P		2019-08-23

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
451		388	63
496		496	
207		207	
4,214		4,589	-375
4,294		4,294	
1,384		1,384	
11,930		5,572	6,358
90,000		90,000	
5,938		5,938	
106		106	

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			63
			-375
			6,358

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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 991SHS S&P 500 COMMON TRUST	P		2019-03-01
165 45SHS STATE ST INSTL US GOVT MKT	P		2019-05-24
165 44SHS STATE ST INSTL US GOVT MKT	P		2019-06-21
74 685SHS PASSIVE BOND MKT	P		2019-05-23
2,576 01SHS STATE STR INSTL US GOVT	P		2019-03-05
3,857 29 STATE STREET INSTL US GOVT	P		2019-10-23
703 246SHS S&P 500 COMMON TRUST	P		2019-04-12
36,320 93SHS STATE ST INSTL US GOVT	P		2019-01-16
44,828 3SHS STATE ST INSTL US GOVT	P		2019-10-22
17 14SHS STATE ST INSTL US GOVT MKT	P		2019-09-23

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
281		130	151
165		165	
165		165	
1,227		1,071	156
2,576		2,576	
3,857		3,857	
103,058		46,315	56,743
36,321		36,321	
44,828		44,828	
17		17	

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			151
			156
			56,743

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
4 97SHS S&P 500 COMMON TRUST	P		2019-04-15
402 75SHS STATE ST INSTL US GOVT MKT	P		2019-06-14
646 95SHS STATE ST INSTL US GOVT MKT	P		2019-07-23
199 105SHS PASSIVE BOND MKT	P		2019-07-18
15,386 15SHS STATE ST INSTL US GOVT	P		2019-04-15
2,882 22 STATE STREET INSTL US GOVT	P		2019-11-22
233 668SHS S&P 500 COMMON TRUST	P		2019-07-18
53,356 77SHS STATE ST INSTL US GOVT	P		2019-01-17
90,000SHS STATE ST INSTL US GOVT	P		2019-11-18
49 45 SHS STATE ST INSTL US GOVT MKT	P		2019-10-23

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
728		324	404
403		403	
647		647	
3,338		2,855	483
15,386		15,386	
2,882		2,882	
35,453		15,573	19,880
53,357		53,357	
90,000		90,000	
49		49	

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			404
			483
			19,880

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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 013SHS S&P 500 COMMON TRUST	P		2019-05-23
4,000SHS STATE ST INSTL US GOVT MKT	P		2019-07-22
272 6SHS STATE ST INSTL US GOVT MKT	P		2019-08-23
13 935SHS S&P 500 COMMON TRUST	P		2019-03-01
3,393 57SHS STATE ST INSTL US GOVT	P		2019-05-23
1,054 63 STATE STREET INSTL US GOVT	P		2019-12-23
76 95SHS S&P 500 COMMON TRUST	P		2019-08-30
12,991 19SHS STATE ST INSTL US GOVT	P		2019-03-04
58,134 05SHS STATE ST INSTL US GOVT	P		2019-11-20
34 14SHS STATE ST INSTL US GOVT MKT	P		2019-11-22

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
144		66	78
4,000		4,000	
273		273	
1,965		925	1,040
3,394		3,394	
1,055		1,055	
11,436		5,128	6,308
12,991		12,991	
58,134		58,134	
34		34	

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			78
			1,040
			6,308

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
8 023SHS S&P 500 COMMON TRUST	P		2019-07-18
992 99SHS STATE ST INSTL US GOVT MKT	P		2019-08-21
147 99SHS STATE ST INSTL US GOVT MKT	P		2019-09-23
41 744SHS S&P 500 COMMON TRUST	P		2019-04-15
3,725 42SHS STATE ST INSTL US GOVT	P		2019-06-14
3,090 587SHS ABERDEEN EMERGING MKTS	P		2019-01-04
362 296SHS S&P 500 COMMON TRUST	P		2019-11-20
28,587 41SHS STATE ST INSTL US GOVT	P		2019-03-05
6,316 64SHS STATE ST INSTL US GOVT	P		2019-12-23
13 71SHS STATE ST INSTL US GOVT MKT	P		2019-12-23

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
1,217		523	694
993		993	
148		148	
6,114		2,772	3,342
3,725		3,725	
42,465		41,740	725
57,440		24,145	33,295
28,587		28,587	
6,317		6,317	
14		14	

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			694
			3,342
			725
			33,295

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
2 006SHS S&P 500 COMMON TRUST	P		2019-11-22
348 65SHS STATE ST INSTL US GOVT MKT	P		2019-10-22
420 34SHS STATE ST INSTL US GOVT MKT	P		2019-10-23
10 132SHS S&P 500 COMMON TRUST	P		2019-05-23
30,000SHS STATE ST INSTL US GOVT	P		2019-07-31
3,660 386SHS ABERDEEN EMERGING MKTS	P		2019-06-12
143SHS SPDR DOW JONES REIT ETF	P		2019-04-11
7,309 32SHS STATE ST INSTL US GOVT	P		2019-03-18
2,413 174SHS TREASURY INFLATION	P		2019-01-07
48 482SHS ABERDEEN EMERGING MKTS	P		2019-06-12

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
318		131	187
349		349	
420		420	
1,444		673	771
30,000		30,000	
54,686		50,307	4,379
14,218		12,150	2,068
7,309		7,309	
34,800		33,761	1,039
724		667	57

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			187
			771
			4,379
			2,068
			1,039
			57

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
8SHS SPDR DOW JONES REIT	P		2019-11-20
872 76SHS STATE ST INSTL US GOVT MKT	P		2019-11-21
307 21SHS STATE ST INSTL US GOVT MKT	P		2019-11-22
62 178SHS S&P 500 COMMON TRUST	P		2019-07-18
9,621 93SHS STATE ST INSTL US GOVT	P		2019-08-21
5,163 95SHS ABERDEEN EMERGING MKTS	P		2019-08-19
87SHS SPDR DOW JONES REIT ETF	P		2019-08-29
90,000SHS STATE ST INSTL US GOVT	P		2019-04-10
1,151 556SHS TREASURY INFLATION	P		2019-08-20
26 149SHS ABERDEEN EMERGING MKTS	P		2019-07-17

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
829		742	87
873		873	
307		307	
9,434		4,128	5,306
9,622		9,622	
75,755		70,971	4,784
8,902		7,932	970
90,000		90,000	
17,906		16,173	1,733
410		360	50

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			87
			5,306
			4,784
			970
			1,733
			50

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
1SHS S&P MIDCAP 400 ETF TRUST	P		2019-07-17
760 69SHS STATE ST INSTL US GOVT MKT	P		2019-11-22
116 06SHS STATE ST INSTL US GOVT MKT	P		2019-12-23
15 044SHS S&P 500 COMMON TRUST	P		2019-11-22
4,389, 94SHS STATE ST INSTL US GOVT	P		2019-10-22

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
354		238	116
761		761	
116		116	
2,387		999	1,388
4,390		4,390	

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			116
			1,388

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	Title, and average hours per week **(b)** devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
MARTIN F JOYCE 218 ATLANTIC AVENUE QUINCY, MA 02171	SECRETARY 000 00	0	0	0
PETER J LEMONIAS 353 SOUTHERN ARTERY QUINCY, MA 02169	PRESIDENT 000 00	0	0	0
KURT E HANSON 67 BRIDLE PATH FRANKLIN, MA 02038	TREASURER 000 00	0	0	0
FREDERICK ARROWSMITH 3 PINE STREET KINGSTON, MA 02364	TRUSTEE 000 00	0	0	0
JOSEPH F BELLOMO 8 HOLLIS STREET NEWTON, MA 02458	TRUSTEE 000 00	0	0	0
THOMAS CROWDIS III 30 KIRK CIRCLE PLYMOUTH, MA 023602372	TRUSTEE 000 00	0	0	0
HAROLD E FLIGHT 146 OLD WASHINGTON ST PEMBROKE, MA 02359	TRUSTEE 000 00	0	0	0
RICHARD RYAN 60 WING BOULEVARD WEST EAST SANDWICH, MA 02537	TRUSTEE 000 00	0	0	0
RUSSELL JOHNSON 50 KENT STREET NEWBURYPORT, MA 019502355	TRUSTEE 000 00	0	0	0
JOHN P MORIARTY 142 MARRETT ROAD LEXINGTON, MA 02421	TRUSTEE 000 00	0	0	0
PAUL LOHNES 353 SOUTHERN ARTERY QUINCY, MA 02169	TRUSTEE 000 00	0	0	0
STEPHEN STICKNEY 8 DONNA ROAD ANDOVER, MA 01810	TRUSTEE 000 00	0	0	0
RICHARD H PETERSON 353 SOUTHERN ARTERY QUINCY, MA 02169	TRUSTEE 000 00	0	0	0
THOMAS F CARROLL 353 SOUTHERN ARTERY QUINCY, MA 02169	TRUSTEE 000 00	0	0	0
STEVEN W ANDERSON 353 SOUTHERN ARTERY QUINCY, MA 02169	TRUSTEE 000 00	0	0	0

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, 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
CHARLES S SULKALA 353 SOUTHER ARTERY QUINCY, MA 02169	VICE PRESIDE 000 00	0	0	0
HAROLD DODAKIAN 353 SOUTHERN ARTERY QUINCY, MA 02169	TRUSTEE 000 00	0	0	0

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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
a *Paid during the year*				
ALZHEIMER'S ASSOCIATION 309 WAVERLY OAKS RD WALTHAM, MA 02452			IN MEMORIAM	100
AMERICAN LEGION POST 86 435 WASHINGTON ST BRAINTREE, MA 02184			IN MEMORIAM	100
ANNUNCIATION GREEK ORTHODOX CATHEDR 514 PARKER ST ROXBURY, MA 02120			IN MEMORIAM	100
Total . . . . ▶ **3a**				258,663

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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
a *Paid during the year*				
BOYS AND GIRLS CLUB OF WAREHAM 13 HIGHLAND AVE ONSET, MA 02558			TRADE RELATED EQUIPMENT AND SUPPORT	3,425
CAPE COD HOSPICE359 MAIN STREET FALMOUTH, MA 02540			IN MEMORIAM	50
CHALLENGE UNLIMITED INC 450 LOWELL ST ANDOVER, MA 01810			TRADE RELATED EQUIPMENT AND SUPPORT	10,460
Total . . . . ▶ **3a**				258,663

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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
a *Paid during the year*				
CHILDREN'S CENTER FOR COMMUNICATION 6 ECHO AVE BEVERLY, MA 01915			TRADE RELATED EQUIPMENT AND SUPPORT	5,133
CITIZENS INN81 MAIN STREET PEABODY, MA 01960			TRADE RELATED EQUIPMENT AND SUPPORT	4,253
DEARBORN ACADEMY 575 WASHINGTON STREET NEWTON, MA 02458			TRADE RELATED EQUIPMENT AND SUPPORT	12,078
Total . . . . ▶ **3a**				258,663

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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
a *Paid during the year*				
DOCTOR FRANKLIN PERKINS SCHOOL 971 MAIN STREET LANCASTER, MA 01523			TRADE RELATED EQUIPMENT AND SUPPORT	3,190
DOUBLE EDGE THEATRE 948 CONWAY RD ASHFIELD, MA 01330			TRADE RELATED EQUIPMENT AND SUPPORT	7,631
EMPLOYMENT OPTIONS INC 82 BRIGHAM STREET MARLBOROUGH, MA 01752			TRADE RELATED EQUIPMENT AND SUPPORT	6,629
Total . . . . ▶ **3a**				258,663

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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
a *Paid during the year*				
ESSEX SHIPBUILDING MUSEUM 66 MAIN STREET ESSEX, MA 01929			TRADE RELATED EQUIPMENT AND SUPPORT	8,342
LOVELANE40 BAKER BRIDGE RD LINCOLN, MA 01773			TRADE RELATED EQUIPMENT AND SUPPORT	4,384
LOWELL'S BOAT SHOP459 MAIN ST AMESBURY, MA 01913			TRADE RELATED EQUIPMENT AND SUPPORT	3,029
Total . . . . ▶ **3a**				258,663

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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
a *Paid during the year*				
MASS BAY COMMUNITY COLLEGE 50 OAKLAND STREET WELLESLEY HILLS, MA 02481			TRADE RELATED EQUIPMENT AND SUPPORT	7,245
MAY INSTITUTE 41 PACELLA PARK DRIVE RANDOLPH, MA 02368			TRADE RELATED EQUIPMENT AND SUPPORT	6,997
NATIONAL BRAILLE PRESS 88 ST STEPHEN STREET BOSTON, MA 02115			TRADE RELATED EQUIPMENT AND SUPPORT	4,978
Total . . . . ▶ **3a**				258,663

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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
a *Paid during the year*				
NORTH BENNETT STREET SCHOOL 39 NORTH BENNET STREET BOSTON, MA 02113			TRADE RELATED EQUIPMENT AND SUPPORT	30,079
NORTHEAST ARC64 HOLTEN STREET DANVERS, MA 01923			TRADE RELATED EQUIPMENT AND SUPPORT	17,859
OLD STURBRIDGE VILLAGE 1 OLD STURBRIDGE VILLAGE STURBRIDGE, MA 01566			TRADE RELATED EQUIPMENT AND SUPPORT	17,974
Total . . . . ▶ **3a**				258,663

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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
a *Paid during the year*				
PLEASANT BAY COMMUNITY BOATING 2287 MA-28 HARWICH, MA 02645			TRADE RELATED EQUIPMENT AND SUPPORT	4,660
COMM OF RELIEF DISTRIBUTIMISC QUINCY, MA 02169			FINANCIAL ASSISTANCE	2,750
SOUTH SHORE ARC371 RIVER STREET WEYMOUTH, MA 02191			TRADE RELATED EQUIPMENT AND SUPPORT	11,161
Total . . . . ▶ **3a**				258,663

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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
a *Paid during the year*				
SOUTH SHORE YMCA 79 CODDINGTON STREET QUINCY, MA 02169			TRADE RELATED EQUIPMENT AND SUPPORT	8,745
THE CARROLL CENTER FOR THE BLIND 770 CENTRE STREET NEWTON, MA 02458			TRADE RELATED EQUIPMENT AND SUPPORT	14,958
THE CULTURAL CENTER OF CAPE COD 307 OLD MAIN ST SOUTH YARMOUTH, MA 02664			TRADE RELATED EQUIPMENT AND SUPPORT	15,260
Total . . . . ▶ **3a**				258,663

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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
a *Paid during the year*				
THE ELIOT SCHOOL24 ELIOT STREET JAMAICA PLAIN, MA 02130			TRADE RELATED EQUIPMENT AND SUPPORT	34,862
THE HOME FOR LITTLE WANDERERS 397 LINCOLN ROAD WALPOLE, MA 02081			TRADE RELATED EQUIPMENT AND SUPPORT	8,181
YARMOUTH PORT LIBRARY297 MA-6A YARMOUTH PORT, MA 02675			TRADE RELATED EQUIPMENT AND SUPPORT	50
Total . . . . ▶ **3a**				258,663

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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
a *Paid during the year*				
SCHOLARSHIP - UNH 353 SOUTHERN ARTERY QUINCY, MA 02169			MISC	4,000
Total . . . . ▶ **3a**				258,663

TY 2019 Accounting Fees Schedule

Name: MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION

EIN: 04-2023566

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PROFESSIONAL	31,184	15,592		

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2019 Depreciation Schedule

Name: MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION

EIN: 04-2023566

Depreciation Schedule

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
DEPRECIATION						7,107			
EQUIPMENT 4	1993-07-01	4,628	4,628	S/L	7 0000				
EQUIPMENT - 95 5	1995-07-01	1,616	1,616	S/L	7 0000				
EQUIPMENT - 96 6	1996-07-01	2,653	2,653	S/L	7 0000				
COMPUTER 7	1999-07-01	2,668	2,668	S/L	3 0000				
COMPUTER EQUIPMENT	2004-01-14	3,624	3,624	S/L	5 0000				
G&A DEPRECIATION			7,347			7,106			

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TY 2019 Gain/Loss from Sale of Other Assets Schedule

Name: MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION

EIN: 04-2023566

Gain Loss Sale Other Assets Schedule

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
ROOF	2009-08	PURCHASE	2019-07			16,500			-2,750	13,750

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TY 2019 Investments Corporate Bonds Schedule

Name: MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION

EIN: 04-2023566

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
PASSIVE BOND MARKET - CMNP	593,039	695,306
BLACKROCK HIGH YIELD	227,344	231,290
TREASURY INFLATION PROTECTED SEC	198,597	220,151

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TY 2019 Investments Corporate Stock Schedule

Name: MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION

EIN: 04-2023566

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
SSGA INTERNATIONAL STOCK SELECTION	636,576	677,617
S&P 500 COMMON TRUST	475,422	1,178,650
ABERDEEN EMERGING MARKETS	340,190	379,938
SPDR DOW JONES REIT ETF	329,019	357,784
STATE STREET INSTL FUNDS	265,002	243,549
IPATH BLOOMBERG COMMODITY INDEX	198,626	188,681
SPDR S&P INTL SMALL CAP ETF FUND	183,021	185,967
SPDR S&P MIDCAP 400	141,701	242,871

TY 2019 Land, Etc. Schedule

Name: MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION

EIN: 04-2023566

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
BUILDING	296,575	276,138	20,437	296,575
BUILDING IMPROVEMENTS	199,102	106,923	92,179	199,102
LAND IMPROVEMENTS	21,666	5,176	16,490	21,666
FURNITURE & FIXTURES	11,565	11,565		11,565
COMPUTER EQUIPMENT	3,624	3,624		3,624
LAND	95,992		95,992	95,992

TY 2019 Other Decreases Schedule

Name: MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION

EIN: 04-2023566

Description	Amount
BOOK/TAX LOSS ON DISPOSAL DIFF	9,694

TY 2019 Other Expenses Schedule

Name: MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION

EIN: 04-2023566

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
COMMERCIAL				
UTILITIES	3,512			
CLEANING & MAINTENANCE	2,691			
ALARM MONITORING	912			
EXPENSES				
EXPENSE OF MEETINGS	26,185	3,928		15,711
INSURANCE	3,749	562		6,248
TELEPHONE	1,893	284		1,136
TRIENNIAL EXPENSE	1,595	239		957
OFFICE SUPPLIES AND EXPENSE	829	125		499

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MA ANNUAL FILING FEE	89	13		53

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TY 2019 Other Income Schedule

Name: MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION

EIN: 04-2023566

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
CLASS ACTION PROCEEDS	1,044		

TY 2019 Other Increases Schedule

Name: MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION

EIN: 04-2023566

Description	Amount
BOOK/TAX DEPRECIATION DIFFERENCE	1,008

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TY 2019 Other Liabilities Schedule

Name: MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION

EIN: 04-2023566

Description	Beginning of Year - Book Value	End of Year - Book Value
SECURITY DEPOSIT PAYABLE		2,200
CASH OVERDRAFT	20,340	

TY 2019 Other Professional Fees Schedule

Name: MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION

EIN: 04-2023566

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INV MANAGEMENT FEES	29,346	29,346		

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TY 2019 Taxes Schedule

Name: MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION

EIN: 04-2023566

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CORPORATE TAXES	2,221	2,221		
LICENSES AND PERMITS	50			

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Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 990-PF
▶ Go to *www irs gov/Form990* for the latest information

OMB No 1545-0047

2019

Name of the organization	Employer identification number
MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION	04-2023566

Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☑ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

☑ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling $5,000 or more (in money or other property) from any one contributor Complete Parts I and II See instructions for determining a contributor's total contributions

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc , purposes, but no such contributions totaled more than $1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions totaling $5,000 or more during the year . . . . ▶ $ ______________

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization	Employer identification number
MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION	04-2023566

Part I **Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	WHITMOR COMPANY 15 WHITMORE ROAD REVERE, MA 02151	$ 20,000	☑ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions)
2	WILLIAM H SCOTT 353 SOUTHERN ARTERY QUINCY, MA 02169	$ 5,000	☑ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions)

Name of organization	Employer identification number
MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION	04-2023566

Part II **Noncash Property**

(see instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

Name of organization	**Employer identification number**
MASSACHUSETTS CHARITABLE MECHANIC ASSOCIATION	04-2023566

Part III ***Exclusively*** **religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than $1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of $1,000 or less for the year. (Enter this information once. See instructions.) ▶ $**

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee