

Form **990-PF****Return of Private Foundation**
or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0047

2019Department of the Treasury
Internal Revenue Service

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► Go to www.irs.gov/Form990PF for instructions and the latest information.

Open to Public Inspection

For calendar year 2019 or tax year beginning , and ending

Name of foundation NATHANIEL & ELIZABETH P STEVENS FOUNDATION		A Employer identification number 04-2236996
Number and street (or P O box number if mail is not delivered to street address) PO BOX 111	Room/suite	B Telephone number (see instructions) 978-688-7211
City or town, state or province, country, and ZIP or foreign postal code NORTH ANDOVER MA 01845		C If exemption application is pending, check here <input type="checkbox"/> 6
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1 Foreign organizations, check here <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 20,755,618 J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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)
1	Contributions, gifts, grants, etc., received (attach schedule)				
2	Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	403,292	403,292		
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	606,087			
b	Gross sales price for all assets on line 6a 2,455,706				
7	Capital gain net income (from Part IV, line 2)		606,087		
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) STMT 1	714,871	547,427		
12	Total. Add lines 1 through 11	1,724,250	1,556,806	0	
13	Compensation of officers, directors, trustees, etc	80,000			
14	Other employee salaries and wages	73,301			
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule)				
b	Accounting fees (attach schedule) STMT 2	7,495			7,495
c	Other professional fees (attach schedule) STMT 3	87,879	87,879		
17	Interest				
18	Taxes (attach schedule) (see instructions) STMT 4	30,782	18,555		12,227
19	Depreciation (attach schedule) and depletion				
20	Occupancy	16,904			16,904
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses (attach schedule) STMT 5	84,272	71,736		12,536
24	Total operating and administrative expenses. Add lines 13 through 23	380,633	178,170	0	49,162
25	Contributions, gifts, grants paid	1,063,000			1,063,000
26	Total expenses and disbursements. Add lines 24 and 25	1,443,633	178,170	0	1,112,162
27	Subtract line 26 from line 12				
a	Excess of revenue over expenses and disbursements	280,617			
b	Net investment income (if negative, enter -0-)		1,378,636		
c	Adjusted net income (if negative, enter -0-)			0	

For Paperwork Reduction Act Notice, see instructions.

Form **990-PF** (2019)

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	14,177	47,726		47,726		
	2	Savings and temporary cash investments	1,676,040	1,407,678		1,407,678		
	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 (att schedule) ▶ Less allowance for doubtful accounts ▶	0					
	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) SEE STMT 6	9,944,033	9,622,099		13,601,352		
	c	Investments – corporate bonds (attach schedule) SEE STMT 7	4,904,303	5,612,321		5,588,428		
	11	Investments – land, buildings, and equipment basis ▶ 16,823 Less accumulated depreciation (attach sch) ▶ STMT 8 16,823						
	12	Investments – mortgage loans						
	13	Investments – other (attach schedule)						
	14	Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch) ▶						
Liabilities	15	Other assets (describe ▶ SEE STATEMENT 9)	11,538	110,434		110,434		
	16	Total assets (to be completed by all filers – see the instructions Also, see page 1, item I)	16,550,091	16,800,258		20,755,618		
	17	Accounts payable and accrued expenses						
	18	Grants payable						
	19	Deferred revenue						
Net Assets or Fund Balances	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				
		Foundations that follow FASB ASC 958, check here and complete lines 24, 25, 29, and 30. ▶ <input checked="" type="checkbox"/>						
Net Assets or Fund Balances	24	Net assets without donor restrictions	16,550,091	16,800,258				
	25	Net assets with donor restrictions						
		Foundations that do not follow FASB ASC 958, check here and complete lines 26 through 30. ▶ <input type="checkbox"/>						
	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)	16,550,091	16,800,258				
Net Assets or Fund Balances	30	Total liabilities and net assets/fund balances (see instructions)	16,550,091	16,800,258				

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	16,550,091
2	Enter amount from Part I, line 27a	2	280,617
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	16,830,708
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 10	5	30,450
6	Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 29	6	16,800,258

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P – Purchase D – Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a PUBLICLY TRADED SECURITIES	P	VARIOUS	VARIOUS
b PUBLICLY TRADED SECURITIES	P	VARIOUS	VARIOUS
c BBH FORM 1099-DIV			
d UNRECAPTURED SEC 1250 GAIN			
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 322,663		255,813	66,850
b 2,078,835		1,593,806	485,029
c 54,208			54,208
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			66,850
b			485,029
c			54,208
d			
e			

2 Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	2	606,087
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	<div> <div>If gain, also enter in Part I, line 8, column (c) See instructions</div> <div>If (loss), enter -0- in Part I, line 8</div> </div>	3	66,850

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2018	1,270,555	19,316,496	0.065776
2017	1,210,359	19,155,338	0.063187
2016	1,199,530	23,386,998	0.051290
2015	1,143,117	19,009,147	0.060135
2014	1,021,448	19,715,523	0.051809

2 Total of line 1, column (d)	2	0.292197
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	0.058439
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	19,646,371
5 Multiply line 4 by line 3	5	1,148,114
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	13,786
7 Add lines 5 and 6	7	1,161,900
8 Enter qualifying distributions from Part XII, line 4	8	1,229,662

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 <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	13,786
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	13,786
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	13,786
6	Credits/Payments		
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	28,983
b	Exempt foreign organizations – tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	28,983
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
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	15,197
11	Enter the amount of line 10 to be Credited to 2020 estimated tax <input type="checkbox"/> 15,197 Refunded <input type="checkbox"/>	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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input type="checkbox"/> \$ (2) On foundation managers <input type="checkbox"/> \$		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$		
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		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
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	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the tax year beginning in 2019? See instructions for Part XIV. If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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
- 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
- 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► **N/A**

	Yes	No
11		X
12		X
13	X	

- 14 The books are in care of ► **JOSHUA L. MINER**
P.O. BOX 111

Telephone no ► **978-688-7211**Located at ► **NORTH ANDOVER****MA**ZIP+4 ► **01845**

- 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**

- 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?

	Yes	No
16		X

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.

- 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 Organizations relying on a current notice regarding disaster assistance, check here

► **1b** **X**

- 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 **X**

- 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 (Part XIII, lines 6d and 6e) 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.)

N/A**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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.)

N/A**3b**

- 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?

4a **X**

- 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 **X**

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

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

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, and foundation managers and their compensation. 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
JOSHUA L. MINER 356 MAIN STREET BOXFORD MA 01921	TRUSTEE 0.00	80,000	0	0
CHRISTOPHER W. ROGERS 46 OCEAN STREET NAHANT MA 01908	TRUSTEE 0.00	0	0	0
EMILY A. DONNAN 20 CENTRAL STREET WINCHESTER MA 01890	TRUSTEE 0.00	0	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
SANDRA CANNELLA ONE JOHNSON STREET NORTH ANDOVER MA 01845	OFFICE MANAG 73,301	0	0	0

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
BROWN BROTHERS HARRIMAN 40 WATER STREET	BOSTON MA 02110	INVESTMENT ADVI	87,879
Total number of others receiving over \$50,000 for professional services			0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (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	19,254,308
b	Average of monthly cash balances	1b	691,246
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	19,945,554
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	19,945,554
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	299,183
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	19,646,371
6	Minimum investment return. Enter 5% of line 5	6	982,319

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	982,319
2a	Tax on investment income for 2019 from Part VI, line 5	2a	13,786
b	Income tax for 2019 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	13,786
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	968,533
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	968,533
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	968,533

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	1,112,162
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	117,500
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	1,229,662
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	13,786
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,215,876

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				968,533
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2019				
a From 2014	46,921			
b From 2015	225,716			
c From 2016	45,813			
d From 2017	273,416			
e From 2018	329,986			
f Total of lines 3a through e	921,852			
4 Qualifying distributions for 2019 from Part XII, line 4 ▶ \$ 1,229,662				
a Applied to 2018, but not more than line 2a				
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				968,533
e Remaining amount distributed out of corpus	261,129			
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	1,182,981			
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				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)				
8 Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions)	46,921			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	1,136,060			
10 Analysis of line 9				
a Excess from 2015	225,716			
b Excess from 2016	45,813			
c Excess from 2017	273,416			
d Excess from 2018	329,986			
e Excess from 2019	261,129			

Form **990-PF** (2019)

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 <i>Paid during the year</i> SEE ATTACHED SCHEDULE	UNRELATED	501(C)(3) CHARITABLE PURPOSE	CHARITABLE PURPOSE	1,063,000
Total				▶ 3a 1,063,000
b <i>Approved for future payment</i> SEE ATTACHED SCHEDULE	UNRELATED	501(C)(3) CHARITABLE PURPOSE	CHARITABLE PURPOSE	
Total				▶ 3b

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?
- a Transfers from the reporting foundation to a noncharitable exempt organization of
- (1) Cash
- (2) Other assets
- b Other transactions
- (1) Sales of assets to a noncharitable exempt organization
- (2) Purchases of assets from a noncharitable exempt organization
- (3) Rental of facilities, equipment, or other assets
- (4) Reimbursement arrangements
- (5) Loans or loan guarantees
- (6) Performance of services or membership or fundraising solicitations
- c Sharing of facilities, equipment, mailing lists, other assets, or paid employees
- 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.

	Yes	No
1a(1)		X
1a(2)		X
1b(1)		X
1b(2)		X
1b(3)		X
1b(4)		X
1b(5)		X
1b(6)		X
1c		X

[illegible]

- 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
N/A		

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.

May the IRS discuss this return with the preparer shown below?
See instructions ☒ Yes

**Sign
Here**

Signature of officer or trustee

Date _____

Title

TRUSTEE

Print/Type preparer's name

Preparer's signature

Date _____

Check ☐ if self-employed

Paid

Preparer
Use Only

KEVIN A. SULLIVAN

KEVIN A. SULLIVAN

08/19/20

Firm's name ▶ **ABEL, ROGERS & SULLIVAN**

PTIN	P00001560
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Firm's address ▶ 1 CORPORATE DR
ANDOVER, MA 01810

Firm's EIN ▶ 04-3073222

Phone no **978-975-3919**

Form **990-PF** (2019)

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 11 - Other Income

Description	Revenue per Books	Net Investment Income	Adjusted Net Income
BBH K-1 ST CAPITAL GAIN (LOSS)	\$ 119,101	\$ 119,101	\$
BBH K-1 LT CAPITAL GAIN (LOSS)	421,401	421,401	
BBH K-1 OTHER INCOME	6,925	6,925	
OFFICE SUPPORT	9,900		
SHARED OFFICE EXPENSE	108,000		
COMMONWEALTH OF MA 2018 CITC	49,544		
TOTAL	\$ 714,871	\$ 547,427	\$ 0

Statement 2 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
ACCOUNTING FEES	\$ 7,495	\$	\$	\$ 7,495
TOTAL	\$ 7,495	\$ 0	\$ 0	\$ 7,495

Statement 3 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
INVESTMENT EXPENSES	\$ 87,879	\$ 87,879	\$	\$
TOTAL	\$ 87,879	\$ 87,879	\$ 0	\$ 0

Statement 4 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
FOREIGN TAX	\$ 18,555	\$ 18,555	\$	\$
STATE FILING FEE	500			500
PAYROLL TAX	11,727			11,727
TOTAL	\$ 30,782	\$ 18,555	\$ 0	\$ 12,227

Federal Statements

Statement 5 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXPENSES				
BANK CHARGES	105			105
INSURANCE	2,202			2,202
OFFICE EXPENSE	2,555			2,555
PO BOX RENTAL	140			140
MAINTENANCE AGREEMENT	2,534			2,534
BBH K-1S 2% FLOOR DEDUCTIONS	71,736	71,736		
DUES & SUBSCRIPTIONS	5,000			5,000
TOTAL	\$ 84,272	\$ 71,736	\$ 0	\$ 12,536

Statement 6 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
TOTAL	\$ 9,944,033	\$ 9,622,099	COST	\$ 13,601,352
	\$ 9,944,033	\$ 9,622,099		\$ 13,601,352

Statement 7 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
TOTAL	\$ 4,904,303	\$ 5,612,321	COST	\$ 5,588,428
	\$ 4,904,303	\$ 5,612,321		\$ 5,588,428

Federal Statements

Statement 8 - Form 990-PF, Part II, Line 11 - Land, Building, and Equipment Investments

Description	Beginning Net Book	End Cost / Basis	End Accumulated Depreciation	Net FMV
	\$	\$ 16,823	\$ 16,823	\$
TOTAL	\$ 0	\$ 16,823	\$ 16,823	\$ 0

Federal Statements**Statement 9 - Form 990-PF, Part II, Line 15 - Other Assets**

Description	Beginning of Year	End of Year	Fair Market Value
BOND COST BASIS ADJUSTMENTS	\$ 11,538	\$ 110,434	\$ 110,434
TOTAL	\$ 11,538	\$ 110,434	\$ 110,434

Statement 10 - Form 990-PF, Part III, Line 5 - Other Decreases

Description	Amount
NONDEDUCTIBLE EXPENSE	\$ 450
FEDERAL TAX	30,000
TOTAL	\$ 30,450

Form 990-PF, Part XV, Line 2b - Application Format and Required Contents

Description
SEE ATTACHED STATEMENT

Form 990-PF, Part XV, Line 2c - Submission Deadlines

Description
SEE ATTACHED STATEMENT

Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations

Description
SEE ATTACHED STATEMENT

Statement 11 - Form 990-PF, Part XVI-A, Line 11 - Other Revenue

Description	Business Code	Unrelated Amount	Exclusion Code	Exclusion Amount	Related Income
BBH K-1 OTHER INCOME		\$		\$	\$ 6,925
OFFICE SUPPORT			1	9,900	
SHARED OFFICE EXPENSE			1	108,000	
OTHER INCOME			1		
CLASS ACTION PROCEEDS			1		
TAX REFUND 2016 RETURN			1		
COMMONWEALTH OF MA 2018 CIT			1	49,544	
TOTAL		\$ 0		\$ 167,444	\$ 6,925

Underdistribution and Excess Distributions for Part XIII

Form **990-PF**

2019

For calendar year 2019, or tax year beginning , ending

Name

**NATHANIEL & ELIZABETH P STEVENS
FOUNDATION**

Employer Identification Number
04-2236996

Undistributed Income Carryovers

Form 990-PF, Part XIII

Tax Year	Prior Undistributed Income			Current Year Decreases	Next Year Carryover	
	Nontaxable or Previously Taxed	Taxable in 2019	Total per Year		Nontaxable or Previously Taxed	Taxable in 2020
Years prior						
20 15						
20 16						
20 17						
2018						
2019			968,533	968,533		
Total Carryover to Next Year						0

* Carryover amount includes 4942(a) amounts

Excess Distribution Carryovers

Form 990-PF, Part XIII

Preceding Tax Year Excess Distributions		Current Year	Next Year
		Decreases	Carryover
2014	46,921	46,921	
2015	225,716		225,716
2016	45,813		45,813
2017	273,416		273,416
2018	329,986		329,986
Current Year Excess Distribution Generated (2019)			261,129
Total Carryover to Next Year			1,136,060

EIN#: 04-2236996

TAX YEAR: 2019

STATEMENT 10 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARTABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST**PROJECT #1 – GREATER LAWRENCE COMMUNITY COUNCIL**

1. THE NATURE AND PURPOSES OF THE PROJECT FOR WHICH THE AMOUNTS ARE BEING SET ASIDE:

	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
GREATER LAWRENCE COMMUNITY COUNCIL	\$30,000	CAPITAL FUNDING FOR NEW CARE CENTER
305 ESSEX ST		
LAWRENCE, MA 01840		

2. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2020 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.
3. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).
4. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.
5. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

<u>NAME</u>	<u>YEAR</u>	<u>AMOUNT</u>
GREATER LAWRENCE	2018	\$35,000
COMMUNITY COUNCIL	2019	35,000
	2020	30,000
	TOTAL	\$100,000

EIN#: 04-2236996

TAX YEAR: 2019

STATEMENT 10 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARTIBABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST**PROJECT #2 – THEATRE ESPRESSO**

1. THE NATURE AND PURPOSES OF THE PROJECT FOR WHICH THE AMOUNTS ARE BEING SET ASIDE:

<u>NAME</u>	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
THEATRE ESPRESSO	\$12,500	BREAD & ROSES PLAY FOR LAWRENCE 5TH
43 BOYNTON STREET #1L		GRADERS
JAMAICA PLAIN, MA 02130		

2. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2020 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.
3. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).
4. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.
5. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

<u>NAME</u>	<u>YEAR</u>	<u>AMOUNT</u>
THEATRE ESPRESSO	2018	\$12,500
	2019	12,500
	2020	12,500
	TOTAL	\$37,500

EIN#: 04-2236996

TAX YEAR: 2019

STATEMENT 10 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARITABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST**PROJECT #3 – MERRIMACK VALLEY YMCA – ANDOVER NORTH ANDOVER BRANCH**

6. THE NATURE AND PURPOSES OF THE PROJECT FOR WHICH THE AMOUNTS ARE BEING SET ASIDE:

<u>NAME</u>	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
MERRIMACK VALLEY YMCA	\$75,000	ANDOVER NORTH ANDOVER BRANCH CAPITAL SUPPORT
101 AMESBURY STREET 4 TH FLOOR		
LAWRENCE, MA 01840		

7. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2020 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.
8. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).
9. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.
10. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

<u>NAME</u>	<u>YEAR</u>	<u>AMOUNT</u>
MERRIMACK VALLEY YMCA	2015	\$75,000
	2020	75,000
	TOTAL	\$150,000

NATHANIEL & ELIZABETH P. STEVENS FOUNDATION
EIN 04-2336996
TAX YEAR 2019
FORM 990PF
PART XV 3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT		FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NAME AND ADDRESS				
Project Adventure Larry Childs, Dir. Of Training/Consulting 719 Cabot Street Beverly, MA 01915	501(C)(3) CHARITABLE ORGANIZATION		Lawrence programming	25,000.00
Aaron's Presents Leith Olimoto, Founder, Exec. Dir. 180 Main Street Andover, MA 01810	501(C)(3) CHARITABLE ORGANIZATION		operating & expansion Lawrence	15,000.00
Bradford Christian Academy Athena Victoria Kennedy, President 87 Oxford Avenue Haverhill, MA 01835	501(C)(3) CHARITABLE ORGANIZATION		tuition assistance Lawrence students	7,500.00
Brush Art Gallery James Dymont, Executive Director 258 Market Street Lowell, MA 01852	501(C)(3) CHARITABLE ORGANIZATION		Dorothy Aron Residency	1,500.00
ECCF Greater Lawrence Summer Fund 175 Andover St. Ste. 101 Ath. Carol Schuster Danvers, MA 01923	501(C)(3) CHARITABLE ORGANIZATION		summer 2019 support	50,000.00
ECCF Greater Lawrence Summer Fund 175 Andover St. Ste. 101 Ath. Carol Schuster Danvers, MA 01923	501(C)(3) CHARITABLE ORGANIZATION		Additional summer fund support NE Ch. For Investigative Reporting	3,000.00
ECCF Greater Lawrence Summer Fund 175 Andover St. Ste. 101 Ath. Carol Schuster Danvers, MA 01923	501(C)(3) CHARITABLE ORGANIZATION		general operating support	2,000.00
Communities Together Victor Martinez, Exec. Dir. PO Box 428 Lawrence, MA 01842	501(C)(3) CHARITABLE ORGANIZATION		Happy Hands Lawrence housing projects	26,000.00
Elevated Thought Foundation Lester Sydney, VP 22 Heather Drive Methuen, MA 01844	501(C)(3) CHARITABLE ORGANIZATION		general operating support	1,000.00
Harvey Girls, Inc. 184 Pleasant Street, Suite 2-104 Methuen, MA 01844	501(C)(3) CHARITABLE ORGANIZATION		operating support	3,000.00
Haverhill Historical Society James Cleary, President 240 Water Street Haverhill, MA 01830	501(C)(3) CHARITABLE ORGANIZATION		fencing & driveway crosswalk projects	3,000.00
Gr. Lowell Family YMCA Paul Ray Adams, Exec. Director 35 YMCA Drive Lowell, MA 01852	501(C)(3) CHARITABLE ORGANIZATION		Capital for expansion of child care space	25,000.00
Marmack Repertory Theatre Elizabeth Keger, Ex. Dir. 132 Warren Street Lowell, MA 01852	501(C)(3) CHARITABLE ORGANIZATION		Lawrence outreach Student Welfare Series, Young Company	7,500.00
Marmack Valley Catholic Charities Deborah Rambo, President, 275 West Broadway Boston, MA 02127	501(C)(3) CHARITABLE ORGANIZATION		parenting program Lawrence	4,000.00
Mill City Groves Lydia Sisson, Co-Chair PO Box 7133 Lowell, MA 01852	501(C)(3) CHARITABLE ORGANIZATION		expand programming	5,000.00
Chatham Children's Fund 100 Monmouth Community Services 168 Depot Road Chatham, MA 02633	501(C)(3) CHARITABLE ORGANIZATION		general operating support	25,000.00
Discovery Museum Neil Gordon, CEO 177 Main Street Acton, MA 01720	501(C)(3) CHARITABLE ORGANIZATION		Admissions & outreach Merrimack Valley	5,500.00
Raising A Reader Donna DiFilippo 98 Hamilton Place 3rd Fl	501(C)(3)			

RECIPIENT		FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NAME AND ADDRESS				
Boston, MA 02108	Phelps Academy PALS	CHARITABLE ORGANIZATION	Lawrence programming	12 500 00
Andover, MA 01810	Beth Parsons Assoc Director 180 Main Street	501(C)(3)		
Philmontropy Massachusetts		CHARITABLE ORGANIZATION	PALS program support	20 000 00
Boston, MA 02110	133 Federal Street, #802 Attn: Jeff Poulos	501(C)(3)	Future of Philanthropy campaign	5 000 00
Project Citizenship	4 Faneuil South Market Building 3rd Floor	501(C)(3)	Lawrence programming	15 000 00
Boston, MA 02109	PO Box 1238	501(C)(3)	Good Nights Sleep program - mattresses	5 000 00
Andover, MA 01810	St. Se Pucde	CHARITABLE ORGANIZATION	operating & support for new teen space	12 000 00
Lowell, MA 01852	Lore Mendez, Exec. Director PO Box 53	501(C)(3)	Workforce Development Program expansion	17 500 00
North Andover, MA 01845	United Teen Equality Center	CHARITABLE ORGANIZATION	Bread & Roses play Lawrence	12 500 00
Gregg Criteria, Ex. Dir. 34 Hurd Street		501(C)(3)	campership Lawrence participant	2 000 00
Lowell, MA 01852	Theatre Espresso	CHARITABLE ORGANIZATION	Labor Day Festival 2019	5 000 00
Wendy Lennett, Director 43 Boylston Street - #1L		501(C)(3)	general operating support	25 000 00
Jamaica Plain, MA 02130	Barton Center for Diabetes Educ	CHARITABLE ORGANIZATION	Pine School Junior Board	2 500 00
Lindsay Charlet, Grants Manager Post Office Box 358		501(C)(3)	operating support	250 00
North Oxford, MA 01537	Bread & Roses Heritage Committee	CHARITABLE ORGANIZATION	Capital for Lawrence project	85 000 00
Glennys Sanchez, President PO Box 1137		501(C)(3)	after-school program Community Day students	28 000 00
Lawrence, MA 01842	Bread & Roses Inc	CHARITABLE ORGANIZATION	UP Leonard, UP Oliver Schools Lawrence	30 000 00
Susan McGibbon-Serra, Exec Director 58 Newbury Street		501(C)(3)	Summer scholarship Lawrence student	5 500 00
Lawrence, MA 01840	ECCF (Inc) Junior Board Massachusetts	CHARITABLE ORGANIZATION	Lawrence programming	7 500 00
175 Andrews St., Suite 101		501(C)(3)	general operating support	2 500 00
Danvers, MA 01923	Fried Parker Scholarship Fund	CHARITABLE ORGANIZATION	Community Inclusion programming Lawrence	5 000 00
Concord, MA 01742	38 Simon Willard Rd	501(C)(3)	Merrimack Valley food distribution	6 000 00
Merrimack Valley YMCA		CHARITABLE ORGANIZATION		
380 Merrimack Street, Bldg 9		501(C)(3)		
Lawrence, MA 01840		CHARITABLE ORGANIZATION		
Windrush Farm		501(C)(3)		
Windrush Farm 479 Lucy St.		CHARITABLE ORGANIZATION		
North Andover, MA 01845		501(C)(3)		
Unlocking Potential		CHARITABLE ORGANIZATION		
90 Canal Street Suite 800		501(C)(3)		
Boston, MA 02114		CHARITABLE ORGANIZATION		
Berklee College of Music		501(C)(3)		
Princess DeMarino Grant Winter 1140 Boylston St. MS1140 1A		CHARITABLE ORGANIZATION		
Boston, MA 02115-3693		CHARITABLE ORGANIZATION		
Boston Shakespeare Project		501(C)(3)		
1 Congress Street Suite 113		CHARITABLE ORGANIZATION		
Boston, MA 02114		501(C)(3)		
Endicott College		CHARITABLE ORGANIZATION		
378 Hale Street		501(C)(3)		
Beverly, MA 01915		CHARITABLE ORGANIZATION		
Girl Scouts of Eastern MA		501(C)(3)		
Michelle Coary Harris Director of Devel 95 Berkeley Street		CHARITABLE ORGANIZATION		
Boston, MA 02118		CHARITABLE ORGANIZATION		
Greater Boston Food Bank		501(C)(3)		
Catherine Amato, Pres 70 South Bay Ave		CHARITABLE ORGANIZATION		
Boston, MA 02118-2700		CHARITABLE ORGANIZATION		

RECIPIENT NAME AND ADDRESS		FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
International Book Fair Dr Dolores Celar MA Ed D 29 Jackson Street Lawrence MA 01840	501(C)(3) CHARITABLE ORGANIZATION		2019 Fall events	7 500 00
Lawrence Heritage State Park Friends of One Jackson Street Attn. Susan Grubski, Board member Lawrence MA 01840	501(C)(3) CHARITABLE ORGANIZATION		Memmack River history boat tours	1 000 00
Lawrence History Center Susan Grubski, Ex. Dir 5 Essex Street Lawrence MA 01840	501(C)(3) CHARITABLE ORGANIZATION		emergency funding for roof repair	85 000 00
Lawrence History Center Susan Grubski, Ex. Dir 5 Essex Street Lawrence MA 01840	501(C)(3) CHARITABLE ORGANIZATION		general operating support	1 000 00
Community Giving Tree PO Box 508 West Bedford MA 01885	501(C)(3) CHARITABLE ORGANIZATION		general operating support	1 000 00
Community Giving Tree PO Box 508 West Bedford, MA 01885	501(C)(3) CHARITABLE ORGANIZATION		general operating support	1 000 00
Food for the World Juda Polanco, Exec. Director PO Box 2012 Methuen, MA 01844	501(C)(3) CHARITABLE ORGANIZATION		general operating support	1 000 00
Indian Hill Music Center PO Box 1484 Attn. Lisa Fiorentino CEO Ludlow, MA 01460	501(C)(3) CHARITABLE ORGANIZATION		partnership with Lawrence Public Schools	5 000 00
Memmack Valley YMCA 360 Memmack Street, Bldg 9 Lawrence MA 01840	501(C)(3) CHARITABLE ORGANIZATION		Memmack Valley CORE 4 Youth Summit	5 000 00
Lazarus House Laura Miller Grants Manager PO Box 408 Lawrence MA 01842	501(C)(3) CHARITABLE ORGANIZATION		general operating support	15 000 00
Lifesaver Ministries Kevin Coffey, Ex. Dir 83 Middlesex Street North Chelmsford, MA 01863	501(C)(3) CHARITABLE ORGANIZATION		general operating support	5 000 00
Lowell House 5555 Memmack Street Lowell MA 01854	501(C)(3) CHARITABLE ORGANIZATION		capital campaign close-out	5 000 00
Massachusetts Adoption Resource Exchange 19 Needham St. Suite 208 Attn. Megan Dolan, Dir. of Devel. Needham MA 02461	501(C)(3) CHARITABLE ORGANIZATION		Services to Lawrence children	4 000 00
Memmack Valley Housing Partnership Jim Wade Exec. Director PO Box 1042 Lowell, MA 01853	501(C)(3) CHARITABLE ORGANIZATION		Project Genesis program support	1 500 00
American Red Cross of MA Pierrea Gauthier Dir. of Found Giving 139 Main Street Cambridge MA 02142	501(C)(3) CHARITABLE ORGANIZATION		Memmack Valley disaster relief services	7 500 00
Up With Music Trudy Larson, Ex. Dir 1213 Salem Street North Andover MA 01845	501(C)(3) CHARITABLE ORGANIZATION		Community Strings program Lawrence	5 000 00
Memmack Valley YMCA 360 Memmack Street, Bldg. 9 Lawrence MA 01840	501(C)(3) CHARITABLE ORGANIZATION		capital campaign close-out	37 500 00
Groundwork Lawrence Heather McMann 60 Island Street Lawrence MA 01840	501(C)(3) CHARITABLE ORGANIZATION		general operating support	1 500 00
Groundwork Lawrence Heather McMann 60 Island Street Lawrence MA 01840	501(C)(3) CHARITABLE ORGANIZATION		Burnston Lawrence project support	3 000 00
Groundwork Lawrence Heather McMann 60 Island Street Lawrence MA 01840	501(C)(3) CHARITABLE ORGANIZATION		general operating support	40 000 00
ECCF Lawrence Schools Turnaround Plan				

RECIPIENT		FOUNDATION STATUS OF RECIPIENT		PURPOSE OF GRANT OR CONTRIBUTION		AMOUNT
NAME AND ADDRESS						
175 Andover St. Ste 101 David Edwards, Pres/CFO Dartmouth, MA 01823		501(C)(3) CHARITABLE ORGANIZATION		Turnaround Plan Contribution		50 000 00
Beyond Soccer Stephanie McAvide Exec. Dir 60 Island St., Suite 508 E Lawrence, MA 01840		501(C)(3) CHARITABLE ORGANIZATION		operating & programming support		20 000 00
Beyond Soccer Stephanie McAvide Exec. Dir 60 Island St. Suite 508 E Lawrence, MA 01840		501(C)(3) CHARITABLE ORGANIZATION		operating & programming support		1 000 00
Hurricane Island Outward Bound School 41 Mechanic Street - Suite 313 Camden, ME 04843		501(C)(3) CHARITABLE ORGANIZATION		general operating support		5 000 00
Community InRoads Joan Kulesh Exec Director 190 Academy Road North Andover, MA 01845		501(C)(3) CHARITABLE ORGANIZATION		operating support		30 000 00
Good Sports 515 Hancock Street Suite 204 Alm. Melissa Harper CEO Quincy, MA 02169		501(C)(3) CHARITABLE ORGANIZATION		Lawrence programs through Access to Play Initiative		10 000 00
Outward Bound USA 255 West 36th St. 8th floor New York, NY 10018		501(C)(3) CHARITABLE ORGANIZATION		general operating support		250 00
Outward Bound USA 255 West 36th St. 8th floor New York, NY 10018		501(C)(3) CHARITABLE ORGANIZATION		general operating support		5 000 00
The German Home Paul Shannon, Administrator 374 Howard Street Lawrence, MA 01841		501(C)(3) CHARITABLE ORGANIZATION		general operating support		15 000 00
Top Notch Scholars Joanne dePena, President 60 Island Street Lawrence, MA 01841		501(C)(3) CHARITABLE ORGANIZATION		operating & program support		25 000 00
Top Notch Scholars Joanne dePena, President 60 Island Street Lawrence, MA 01841		501(C)(3) CHARITABLE ORGANIZATION		general operating support		1 000 00
Groundwork Lawrence Heather McIlm 60 Island Street Lawrence MA 01840 Lawrence, MA 01840		501(C)(3) CHARITABLE ORGANIZATION		capital for purchase of pickup truck		20 000 00
Bolkeani Academy 94 Bradford Street Lawrence, MA 01840		501(C)(3) CHARITABLE ORGANIZATION		general operating support		250 00
Bolkeani Academy 94 Bradford Street Lawrence, MA 01840		501(C)(3) CHARITABLE ORGANIZATION		general operating support		40 000 00
ECCF Greater Lawrence Summer Fund 175 Andover St. Ste 101 Alm. Carol Schuster Dartmouth, MA 01823		501(C)(3) CHARITABLE ORGANIZATION		summer 2019 support		500 00
Essex County Greenball Assoc. 82 Eastern Avenue Alm. Kats Bowditch, Exec Dir Essex, MA 01829		501(C)(3) CHARITABLE ORGANIZATION		general operating support		500 00
Experientia Academy 188 Garden Street Lawrence, MA 01840		501(C)(3) CHARITABLE ORGANIZATION		general operating support		250 00
Experientia Academy 188 Garden Street Lawrence, MA 01840		501(C)(3) CHARITABLE ORGANIZATION		general operating support		2 500 00
Governor's Academy 1 Elm Street Byfield, MA 01922		501(C)(3) CHARITABLE ORGANIZATION		general operating support		2 500 00
Governor's Academy 1 Elm Street Byfield, MA 01922		501(C)(3) CHARITABLE ORGANIZATION		general operating support - GOVS Plus		1 000 00
Governor's Academy 1 Elm Street		501(C)(3)				

RECIPIENT NAME AND ADDRESS		FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
Byfield, MA 01922		CHARITABLE ORGANIZATION		
Governor's Academy			Class of 1989 gift	5 000 00
1 Elm Street		501(C)(3)		
Byfield, MA 01922		CHARITABLE ORGANIZATION	Shelley French capital	2 000 00
Governor's Academy GOVS PLUS				
1 Elm St		501(C)(3)	GOVS Plus program support	250 00
Byfield, MA 01922		CHARITABLE ORGANIZATION		
Governor's Academy GOVS PLUS				
1 Elm St		501(C)(3)	GOVS Plus Lawrence students	10 000 00
Byfield, MA 01922		CHARITABLE ORGANIZATION		
Gr Lawrence Community Action Council				
305 Essex Street, 4th Floor Attn Evelyn Friedman Exec Dir		501(C)(3)	capital for child care center	35 000 00
Lawrence, MA 01840		CHARITABLE ORGANIZATION		
Hurricane Island Outward Bound				
41 Mechanic Street - Suite 313		501(C)(3)	scholarships	500 00
Camden, ME 04843		CHARITABLE ORGANIZATION		
Lafayette College				
Box 3000		501(C)(3)	general operating support annual fund	250 00
Easton, PA 18042		CHARITABLE ORGANIZATION		
The Open Door				
Jude LaFontaine Ex Dir 28 Emerson Ave		501(C)(3)	general operating support	250 00
Gloucester, MA 01930		CHARITABLE ORGANIZATION		
Pike School				
34 Sunset Rock Road		501(C)(3)	general operating support	500 00
Andover, MA 01810		CHARITABLE ORGANIZATION		
School Year Abroad				
120 Water Street Ste 310		501(C)(3)	general operating support	250 00
North Andover, MA 01845		CHARITABLE ORGANIZATION		
Suenos Basketball				
2 Linden Street Attn Jacqueline Marie		501(C)(3)	court time - operating	5 000 00
Lawrence, MA 01841		CHARITABLE ORGANIZATION		
Suenos Basketball				
2 Linden Street Attn Jacqueline Marie		501(C)(3)	stipends 2 Lawrence girls assisting w/ summer program	2 000 00
Lawrence, MA 01841		CHARITABLE ORGANIZATION		
Thompson Island Outward Bound				
PO Box 127		501(C)(3)	general operating support	250 00
Boston, MA 02127		CHARITABLE ORGANIZATION		
Windrush Farm				
479 Lucy St		501(C)(3)	general operating support	250 00
North Andover, MA 01845		CHARITABLE ORGANIZATION		
Essex Art Center				
Essex Art Center 58 Island Street		501(C)(3)	operating support & Summer Fridays Lawrence program	45 000 00
Lawrence, MA 01840		CHARITABLE ORGANIZATION		
Essex County Greenbelt Assoc				
82 Eastern Avenue Attn Kate Bowditch, Exec Dir		501(C)(3)	purchase & protection of Glenvale property in North Andover	7 500 00
Essex, MA 01928		CHARITABLE ORGANIZATION		
Windrush Farm				
479 Lucy St		501(C)(3)	General operating support	2 500 00
North Andover, MA 01845		CHARITABLE ORGANIZATION		
St James Episcopal Church				
119 Washington Street		501(C)(3)	general operating support	2 500 00
Groveland, MA 01834		CHARITABLE ORGANIZATION		
TOTAL				1,063,000 00

NATHANIEL & ELIZABETH P. STEVENS FOUNDATION
 EIN: 04-2236996
 TAX YEAR: 2019
 FORM 990PF
 PART XV 3b GRANTS AND CONTRIBUTIONS APPROVED FOR FUTURE PAYMENT

RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NONE	NONE	NONE	

TOTAL