



Form **990-PF**

Return of Private Foundation

OMB No 1545-0047

2019

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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.

For calendar year 2019 or tax year beginning , 2019, and ending , 20

Name of foundation: **THE MARY P BARTON CHARITABLE FOUNDATION**

Number and street (or P O box number if mail is not delivered to street address): **265 FRANKLIN ST., BOS-301**

Room/suite: _____

City or town, state or province, country, and ZIP or foreign postal code: **BOSTON, MA 02110**

A Employer identification number: **04-3478593**

B Telephone number (see instructions): **781-581-4275**

C If exemption application is pending, check here

D 1 Foreign organizations, check here
2 Foreign organizations meeting the 85% test, check here and attach computation

E If private foundation status was terminated under section 507(b)(1)(A), check here

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

G Check all that apply: Initial return Initial return of a former public charity
 Final return Amended return
 Address change Name change

H Check type of organization: Section 501(c)(3) exempt private foundation **04**
 Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) **\$ 4,553,943.**

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

SCANNED MAY 21 2021

03/04

Detach 990PF

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	96,613.	95,380.		STMT 1
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	-8,394			
b	Gross sales price for all assets on line 6a	3,529,860			
7	Capital gain net income (from Part IV, line 2)				
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)				
12	Total Add lines 1 through 11	88,219.	95,380.		
13	Compensation of officers, directors, trustees, etc.	29,226.	14,613.		14,613.
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule)				
b	Accounting fees (attach schedule) STMT 5	900.	450.	NONE	450.
c	Other professional fees (attach schedule) STMT 6	34,969.	17,484.		17,484.
17	Interest				
18	Taxes (attach schedule) (see instructions) STMT 7	973.	872.		
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses (attach schedule) STMT 8	500.			
24	Total operating and administrative expenses				
	Add lines 13 through 23	66,568.	33,419.	NONE	32,547.
25	Contributions, gifts, grants paid	20,000.			20,000.
26	Total expenses and disbursements Add lines 24 and 25	86,568.	33,419.	NONE	52,547.
27	Subtract line 26 from line 12.				
a	Excess of revenue over expenses and disbursements	1,651.			
b	Net investment income (if negative, enter -0-)		61,961.		
c	Adjusted net income (if negative, enter -0-)				

623



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				
	2	Savings and temporary cash investments				
	3	Accounts receivable ▶				
		Less allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)				
	7	Other notes and loans receivable (attach schedule) ▶				
		Less allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U S and state government obligations (attach schedule)				
	b	Investments - corporate stock (attach schedule)	4,052,922.	3,868,162.	4,553,943.	
	c	Investments - corporate bonds (attach schedule)				
	Liabilities	11	Investments - land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶				
12		Investments - mortgage loans				
13		Investments - other (attach schedule)				
14		Land, buildings, and equipment basis ▶				
		Less accumulated depreciation (attach schedule) ▶				
15		Other assets (describe ▶)				
16		Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)	4,052,922.	3,868,162.	4,553,943.	
17		Accounts payable and accrued expenses				
18		Grants payable				
19	Deferred revenue					
20	Loans from officers, directors, trustees, and other disqualified persons					
21	Mortgages and other notes payable (attach schedule)					
22	Other liabilities (describe ▶)					
23	Total liabilities (add lines 17 through 22)		NONE			
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ <input type="checkbox"/> and complete lines 24, 25, 29, and 30					
	24	Net assets without donor restrictions				
	25	Net assets with donor restrictions				
	Foundations that do not follow FASB ASC 958, check here ▶ <input checked="" type="checkbox"/> and complete lines 26 through 30					
	26	Capital stock, trust principal, or current funds	4,052,922.	3,868,162.		
	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)	4,052,922.	3,868,162.			
30	Total liabilities and net assets/fund balances (see instructions)	4,052,922.	3,868,162.			

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	4,052,922.
2	Enter amount from Part I, line 27a	2	1,651.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	4,054,573.
5	Decreases not included in line 2 (itemize) ▶ BOOK VALUE ADJUSTMENT	5	186,411.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	3,868,162.



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)
1 a PUBLICLY TRADED SECURITIES						
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 3,529,860.		3,538,254.	-8,394.			
b						
c						
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			-8,394.			
b						
c						
d						
e						
2 Capital gain net income or (net capital loss)				2	-8,394.	
{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }						
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):				3		
If gain, also enter in Part I, line 8, column (c). See instructions. If (loss), enter -0- in Part I, line 8						

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	NONE	423,622.	NONE
2017			
2016			
2015			
2014			
2 Total of line 1, column (d)			2 NONE
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 NONE
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5			4 4,232,119.
5 Multiply line 4 by line 3.			5 NONE
6 Enter 1% of net investment income (1% of Part I, line 27b).			6 620.
7 Add lines 5 and 6.			7 620.
8 Enter qualifying distributions from Part XII, line 4			8 52,547.
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			



3

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

Table with 11 rows for excise tax calculations. Line 1: 620. Line 2: NONE. Line 3: 620. Line 4: NONE. Line 5: 620. Line 6a-6d: NONE. Line 7: NONE. Line 8: 4. Line 9: 624. Line 10: NONE. Line 11: Refunded.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. 1a: No. 1b: No. 1c: No. 2: No. 3: No. 4a: No. 4b: No. 5: No. 6: Yes. 7: Yes. 8a: MA. 8b: Yes. 9: No. 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		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement See instructions.		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>N/A</u>	X	
14 The books are in care of ▶ <u>EASTERN WEALTH MANAGEMENT</u> Telephone no ▶ <u>(781) 581-4275</u> Located at ▶ <u>265 FRANKLIN ST., BOS-301, BOSTON, MA</u> ZIP+4 ▶ <u>02110</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ▶ <u>15</u>		
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?		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.

	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions		
Organizations relying on a current notice regarding disaster assistance, check here ▶ <input type="checkbox"/>		
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019?		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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ _____, _____, _____		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)		
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ _____, _____, _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 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)		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		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

(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 Yes No

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? Yes No

If "Yes" to 6b, file Form 8870

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? Yes No

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? Yes 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
EASTERN BANK, TRUSTEE 265 FRANKLIN ST., BOS-301, BOSTON, MA 02110	TRUSTEE 1	29,226.	-0-	-0-

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

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

Total number of other employees paid over \$50,000 Yes No NONE



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		NONE

Total number of others receiving over \$50,000 for professional services **NONE**

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 NONE	
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 NONE	
2	
All other program-related investments See instructions	
3 NONE	

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	4,296,568.
b	Average of monthly cash balances	1b	NONE
c	Fair market value of all other assets (see instructions).	1c	NONE
d	Total (add lines 1a, b, and c)	1d	4,296,568.
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	NONE
3	Subtract line 2 from line 1d.	3	4,296,568.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	64,449.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,232,119.
6	Minimum investment return. Enter 5% of line 5	6	211,606.

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	211,606.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	620.
b	Income tax for 2019. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b.	2c	620.
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	210,986.
4	Recoveries of amounts treated as qualifying distributions.	4	NONE
5	Add lines 3 and 4	5	210,986.
6	Deduction from distributable amount (see instructions).	6	NONE
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	210,986.

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	52,547.
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	NONE
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)	3b	NONE
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	52,547.
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	620.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	51,927.

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				210,986.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only.			19,613.	
b Total for prior years 20____,20____,20____		NONE		
3 Excess distributions carryover, if any, to 2019				
a From 2014	NONE			
b From 2015	NONE			
c From 2016	NONE			
d From 2017	NONE			
e From 2018	NONE			
f Total of lines 3a through e	NONE			
4 Qualifying distributions for 2019 from Part XII, line 4 ▶ \$ <u>52,547.</u>				
a Applied to 2018, but not more than line 2a			19,613.	
b Applied to undistributed income of prior years (Election required - see instructions)		NONE		
c Treated as distributions out of corpus (Election required - see instructions)	NONE			
d Applied to 2019 distributable amount.				32,934.
e Remaining amount distributed out of corpus.	NONE			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a))	NONE			NONE
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	NONE			
b Prior years' undistributed income Subtract line 4b from line 2b.		NONE		
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		NONE		
d Subtract line 6c from line 6b Taxable amount - see instructions		NONE		
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.				178,052.
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)	NONE			
8 Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions)	NONE			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	NONE			
10 Analysis of line 9				
a Excess from 2015	NONE			
b Excess from 2016	NONE			
c Excess from 2017	NONE			
d Excess from 2018	NONE			
e Excess from 2019	NONE			



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

NOT APPLICABLE

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 foundation is a private operating foundation described in section 4942(j)(3) of 4942(j)(5)

Table with 5 columns: Tax year (a) 2019, Prior 3 years (b) 2018, (c) 2017, (d) 2016, (e) Total. Rows include 2a through 3c with various sub-rows for alternative tests.

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).)

N/A

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.

N/A

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 email address of the person to whom applications should be addressed:

N/A

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

N/A

c Any submission deadlines

N/A

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

N/A



Part XV Supplementary Information *(continued)*

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ANNA JAQUES COMMUNITY HEALTH FND	NONE	NONE	UNRESTRICTED	10,000.
BOYS & GIRLS CLUB LOWER MERRIMACK VALLEY	NONE	NONE	UNRESTRICTED	10,000.
Total				3a 20,000.
b Approved for future payment				
Total				3b

THE MARY P BARTON CHARITABLE FOUNDATION

04-3478593

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
AFLAC CORP 3.625% 11/15/2024	1,825.	1,825.
AT & T INC	1,911.	1,911.
ABBOTT LABORATORIES INC	554.	554.
ABBVIE INC	519.	519.
AIR PRODUCTS & CHEMICALS	522.	522.
ALABAMA POWER CO 3.55% 12/01/2023	1,856.	1,856.
ALBEMARLE CORP	245.	245.
ALLSTATE CORP	850.	850.
ANALOG DEVICES	667.	667.
ANDOVER MASS 1.25% 01/15/2019	313.	313.
APPLE INC	1,037.	1,037.
BANK AMERICA CORP	209.	209.
BEDFORD MASS 2% 10/15/2020	1,217.	1,217.
BLACKROCK INC.	1,069.	1,069.
BMO TCH CORPORATE INCOME FUND	1,218.	1,218.
BOEING CO	302.	302.
BRISTOL MYERS SQUIBB	203.	203.
BROADCOM INC	1,781.	1,781.
CVS HEALTH CORP HEALTH CORPORATION	1,016.	1,016.
CATERPILLAR INC.	676.	676.
CHEVRON CORP	1,561.	1,561.
CISCO SYSTEMS INC	382.	382.
CITIGROUP 3.3% 04/24/2025	1,158.	1,158.
COGNIZANT TECHNOLOGY SOL	132.	132.
COMCAST CORP NEW CL A	642.	642.
CONOCOPHILLIPS	756.	756.
COSTCO WHOLESALE CORP, NEW	323.	323.
CROWN CASTLE INTERNATIONAL CORP	714.	523.
DANAHER CORP	186.	186.
DARDEN RESTAURANTS INC.	280.	280.
DOWDUPONT INC.	188.	188.
FEDEX CORPORATION	27.	27.

THE MARY P BARTON CHARITABLE FOUNDATION

04-3478593

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
GLAXO 3.375% 05/15/2023	1,136.	1,136.
HADLEY MASS 2% 05/01/2019	750.	750.
HOLYOKE MASS GO ST QUALIFIED REF 2% 09/0	592.	592.
HOME DEPOT INC	1,229.	1,229.
HONEYWELL INT'L INC.	790.	790.
INTERCONTEXCHANGE GROUP INC	317.	317.
INTUIT	134.	134.
I SHARES MSCI EMERGING MKT INDEX	1,945.	1,945.
I SHARES BARCLAYS 7-10 YR TREAS	1,131.	1,131.
I SHARES BARCLAYS 1-3 YR TR BD	401.	401.
I SHARES RUSSELL 2000 TRUST	1,028.	1,028.
I SHARES BARCLAYS 3-7 YR T	1,178.	1,178.
J P MORGAN CHASE & CO	2,153.	2,153.
JOHNSON & JOHNSON	1,245.	1,245.
KIMBERLY-CLARK CORP	207.	207.
LENOX MA 2% 06/01/2021	342.	342.
LEOMINSTER MA 2% 11/01/2019	1,500.	1,500.
LINCOLN, MASS 2% 05/01/2019	300.	300.
MARBLEHEAD MASS 2% 08/01/2022	2,409.	2,409.
MASCO CORP	24.	24.
MASHPEE MASS 2% 09/01/2019	608.	608.
MASSACHUSETTS STATE 2% 09/01/2022	432.	432.
MATTAPOISETT, MASS 2% 03/15/2019	250.	250.
MATTAPOISETT, MASS 2% 03/15/2021	500.	500.
MCDONALD'S CORP	897.	897.
MCDONALDS CORP MTN 3.25% 06/10/2024	1,745.	1,745.
MEDFIELD MASS 2% 09/15/2019	1,196.	1,196.
MERCK & CO INC. NEW	1,070.	1,070.
MICROSOFT	840.	840.
MIDDLEBOROUGH MA 2% 03/01/2020	584.	584.
MILFORD MASS 2% 12/15/2023	1,400.	1,400.
FEDERATED GOV'T OBLIGATION TAX MANAGED F	3,657.	3,657.
MORGAN STANLEY 4% 07/23/2025	1,009.	1,009.

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THE MARY P BARTON CHARITABLE FOUNDATION

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FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
MOTOROLA SOLUTIONS, INC.	407.	407.
NANTUCKET TOWN OF 2% 10/15/2020	235.	235.
NANTUCKET TOWN OF 2% 10/15/2021	1,113.	1,113.
NASHOBA REGIONAL SCHOOL DISTRICT 2.25% 0	648.	648.
NEXTERA ENERGY INC	900.	900.
NIKE INC. CL B	32.	32.
NORTHROP GRUMMAN	671.	671.
OCCIDENTAL PETROLEUM CORP	289.	289.
OMNICOM GROUP	261.	261.
PNC BANK CORP	705.	705.
PEABODY MASS 2% 09/15/2019	500.	500.
PEPSICO INC	1,199.	1,199.
PHILLIPS 66	949.	949.
PHILLIPS 4.3% 04/01/2022	997.	997.
PROCTER & GAMBLE CO	1,112.	1,112.
QUALCOMM INC 3% 05/20/2022	1,698.	1,698.
QUEST DIAGNOSTIC INC. 2.7% 04/01/2019	966.	966.
SPDR S&P 500 ETF TRUST	1,515.	1,515.
SPDR MSCI ACWI EX-US ETF	3,156.	3,156.
SPDR PORTFOLIO INT TERM CORP BD ETF	906.	906.
SPDR S&P BIOTECH	2.	2.
SALISBURY MASS 2% 09/15/2023	2,319.	2,319.
SCHLUMBERGER LTD	93.	93.
CHARLES SCHWAB	524.	524.
TOWN OF SOUTH HADLEY MA 2% 05/15/2021	458.	458.
STATE STREET CORP 2.55% 08/18/2020	1,530.	1,530.
SUDBURY MA 2% 10/15/2022	986.	986.
SYSCO CORP	826.	826.
SYSCO CORP 3.3% 07/15/2026	21.	21.
TYNGSBORO MASS 2.375% 10/15/2022	1,306.	1,306.
UNITED TECHNOLOGIES CORP	873.	873.
UNITED TECHNOLOGIES CORP 3.35% 08/16/202	1,005.	1,005.
UNITEDHEALTH GROUP, INC	671.	671.

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THE MARY P BARTON CHARITABLE FOUNDATION

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FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
UNITEDHEALTH GROUP, INC 3.75% 07/15/2025	218.	218.
VANGUARD EMERGING MARKETS ETF	2,158.	2,158.
VERIZON COMMUNICATIONS INC	1,965.	1,965.
VISA, INC	383.	383.
WALMART, INC.	445.	445.
WAREHAM MASS 2% 10/15/2020	235.	235.
WESTON MASS 2% 02/01/2019	250.	250.
WISDOMTREE EMERGING MKTS SM CAP DIV	2,586.	2,586.
XCEL ENERGY, INC.	842.	842.
EATON CORP PLC	1,042.	
INGERSOLL RAND PLC	223.	223.
ROYAL CARIBBEAN CRUISES, LTD.	55.	55.

TOTAL 96,613. 95,380.

THE MARY P BARTON CHARITABLE FOUNDATION

04-3478593

FORM 990PF, PART I - ACCOUNTING FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
TAX PREPARATION FEE (NON-ALLOC	900.		450.	450.
TOTALS	900.	450.	NONE	450.

THE MARY P BARTON CHARITABLE FOUNDATION

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FORM 990PF, PART I - OTHER PROFESSIONAL FEES
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DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	CHARITABLE PURPOSES
INVESTMNT MNGMNT FEES (NON-DED)	34,969.	17,484.	17,484.
TOTALS	34,969.	17,484.	17,484.

THE MARY P BARTON CHARITABLE FOUNDATION

04-3478593

FORM 990PF, PART I - TAXES
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DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
FOREIGN TAXES	74.	74.
FEDERAL TAX PAYMENT - PRIOR YE	101.	
FOREIGN TAXES ON QUALIFIED FOR	425.	425.
FOREIGN TAXES ON NONQUALIFIED	373.	373.
TOTALS	973.	872.



THE MARY P BARTON CHARITABLE FOUNDATION

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FORM 990PF, PART I - OTHER EXPENSES

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DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----
OTHER ALLOCABLE EXPENSE-PRINCI	500.

TOTALS	500.
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H AND F NOYES MEMORIAL FUND

04-6269751

SUPPLEMENTAL SCHEDULE INDICATING SALES WITH NO COST BASIS OR DATE ACQUIRED

SECURITY SOLD	DATE ACQUIRED	DATE SOLD	COST BASIS	SALES PRICE	GAIN OR LOSS TO BE REPORTED	
					SHORT-TERM	LONG-TERM

115. BECTON DICKINSON CO	01/01/1901	01/08/2019	8,759.00	25,543.00		
13. HONEYWELL INT'L INC.	01/01/1901	01/08/2019	636.00	1,753.00		
5. HONEYWELL INT'L INC.	01/01/1901	12/20/2019	244.00	885.00		
6. JOHNSON & JOHNSON	01/01/1901	12/20/2019	405.00	878.00		
6. PROCTER & GAMBLE CO	01/01/1901	12/20/2019	379.00	758.00		