

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

Name of foundation HURDLE HILL FOUNDATION C/O WOODSTOCK SERVICES CO LLC		A Employer identification number 04-6012782	
Number and street (or P.O. box number if mail is not delivered to street address) 101 ARCH ST NO 1000	Room/suite	B Telephone number (see instructions) (617) 227-0600	
City or town, state or province, country, and ZIP or foreign postal code BOSTON, MA 02110		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) ▶\$ 702,289	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)	59,209			
	2 Check ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities . . .	11,600	11,487		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	5,629			
	b Gross sales price for all assets on line 6a _____ 71,849				
	7 Capital gain net income (from Part IV, line 2) . . .		46,640		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	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	76,438	58,127		
	13 Compensation of officers, directors, trustees, etc.	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	5,000	3,333		1,667
	c Other professional fees (attach schedule)	6,072	4,048		2,024
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	4,131	21		0
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	39	4		35
	24 Total operating and administrative expenses. Add lines 13 through 23	15,242	7,406		3,726
	25 Contributions, gifts, grants paid	56,500			56,500
	26 Total expenses and disbursements. Add lines 24 and 25	71,742	7,406		60,226
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	4,696			
	b Net investment income (if negative, enter -0-)		50,721		
	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			
	2 Savings and temporary cash investments	33,067	32,587	32,587
	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)	390,173	395,347	669,702
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)			
	14 Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	423,240	427,934	702,289	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ _____)			
	23 Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☐ 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 ▶ ☒ and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds	423,240	427,934	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund	0	0	
	28 Retained earnings, accumulated income, endowment, or other funds	0	0	
	29 Total net assets or fund balances (see instructions)	423,240	427,934	
30 Total liabilities and net assets/fund balances (see instructions) .	423,240	427,934		

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	423,240
2 Enter amount from Part I, line 27a	2	4,696
3 Other increases not included in line 2 (itemize) ▶ _____	3	0
4 Add lines 1, 2, and 3	4	427,936
5 Decreases not included in line 2 (itemize) ▶ _____	5	2
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	6	427,934

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	46,640
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	55,766	560,418	0.099508
2017	50,536	504,260	0.100218
2016	44,459	466,822	0.095238
2015	57,221	468,166	0.122224
2014	51,999	436,099	0.119237
2 Total of line 1, column (d)			2 0.536425
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 0.107285
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5			4 618,647
5 Multiply line 4 by line 3			5 66,372
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 507
7 Add lines 5 and 6			7 66,879
8 Enter qualifying distributions from Part XII, line 4			8 60,226

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	1,014
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	1,014
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	1,014
6	Credits/Payments:		
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	2,960
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	2,960
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.	8	0
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	1,946
11	Enter the amount of line 10 to be: Credited to 2020 estimated tax 1,946 Refunded	11	0

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?		No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>		No
c Did the foundation file Form 1120-POL for this year?		No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0 (2) On foundation managers. \$ 0		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>		No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>		No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		No
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? <i>If "Yes," attach the statement required by General Instruction T.</i>		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?	Yes	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) MA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation.</i>	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. <i>If "Yes," complete Part XIV</i>		No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>		No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	13	Yes	
14	The books are in care of ► <u>WOODSTOCK SERVICES CO LLC</u> Telephone no. ► <u>(617) 227-0600</u>			

Located at ► 101 ARCH STREET BOSTON MAZIP+4 ► 02110

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?	16	Yes	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	No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 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	
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
c	Organizations relying on a current notice regarding disaster assistance check here. ☐		
	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	
	<i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i>		
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?		6b
	<i>If "Yes" to 6b, file Form 8870.</i>		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
HENRY P PHIPPEN C/O AGAWAM TRUST MANAGEMENT CO BOSTON, MA 02110	TRUSTEE 2.00	0	0	0
WILLIAM L PHIPPEN C/O AGAWAM TRUST MANAGEMENT CO BOSTON, MA 02110	TRUSTEE 0.50	0	0	0
PETER D PHIPPEN C/O AGAWAM TRUST MANAGEMENT CO BOSTON, MA 02110	TRUSTEE 0.25	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
NONE				
Total number of other employees paid over \$50,000.				0

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

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

Part IX-A Summary of Direct Charitable Activities

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

1	Expenses

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	597,884
b	Average of monthly cash balances.	1b	30,184
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	628,068
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	628,068
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	9,421
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	618,647
6	Minimum investment return. Enter 5% of line 5.	6	30,932

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	30,932
2a	Tax on investment income for 2019 from Part VI, line 5.	2a	1,014
b	Income tax for 2019. (This does not include the tax from Part VI.).	2b	
c	Add lines 2a and 2b.	2c	1,014
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	29,918
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	29,918
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	29,918

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	1a	60,226
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	60,226
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	60,226

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				29,918
2 Undistributed income, if any, as of the end of 2019:				
a Enter amount for 2018 only.			0	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2019:				
a From 2014. 31,091				
b From 2015.				
c From 2016. 42,010				
d From 2017. 50,536				
e From 2018. 55,766				
f Total of lines 3a through e.	179,403			
4 Qualifying distributions for 2019 from Part XII, line 4: ► \$ 60,226				
a Applied to 2018, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2019 distributable amount.				29,918
e Remaining amount distributed out of corpus	30,308			
5 Excess distributions carryover applied to 2019. (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	209,711			
b Prior years' undistributed income. Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b. Taxable amount—see instructions.		0		
e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
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).	0			
8 Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions). . . .	31,091			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a.	178,620			
10 Analysis of line 9:				
a Excess from 2015.				
b Excess from 2016. 42,010				
c Excess from 2017. 50,536				
d Excess from 2018. 55,766				
e Excess from 2019. 30,308				

Part XIV

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)

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

Part XV

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).)

See Additional Data Table

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

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

c Any submission deadlines:

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

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			3a	56,500
b <i>Approved for future payment</i>				
Total			3b	0

Enter gross amounts unless otherwise indicated.

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.)

[illegible]

Part XVII

		Yes	No
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1a(1)		No
1a(2)		No

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1b(1)	No
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1b(2)		No
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1b(3)		No
--------------	--	-----------

1b(4)		No
--------------	--	-----------

1b(5)		No
--------------	--	-----------

1b(6)		No
--------------	--	-----------

1c		No
----	--	----

value
ue

[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

Sign Here ***** _____ Signature of officer or trustee	2020-06-22 _____ Date	***** _____ Title
--	--	--

May the IRS discuss this return with the preparer shown below

(see instr.) ☒ **Yes** ☐ **No**

Paid Preparer Use Only	THOMAS J LESPASIO		2020-06-22		
	Firm's name ► WOODSTOCK SERVICES COMPANY LLC				Firm's EIN ► 20-8708209
	Firm's address ► 101 ARCH STREET SUITE 1000 BOSTON, MA 02110				Phone no. (617) 227-0600

May the IRS discuss this return with the preparer shown below

(see instr.) ☒ **Yes** ☐ **No**

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

List and describe the kind(s) of property sold (e.g., real estate, (a) 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.)
83 SHS ABBOTT LABORATORIES	D	1973-10-17	2019-10-11
100 SHS ABBOTT LABORATORIES	D	1973-10-17	2019-10-21
5 SHS ABBOTT LABORATORIES	D	1973-07-06	2019-10-25
18 SHS ABBOTT LABORATORIES	D	1973-07-06	2019-10-25
67 SHS ABBOTT LABORATORIES	D	1973-07-06	2019-10-25
33 SHS ABBOTT LABORATORIES	D	1973-07-06	2019-10-31
125 SHS ABBOTT LABORATORIES	D	1973-07-06	2019-10-31
42 SHS ABBOTT LABORATORIES	D	1973-10-17	2019-10-31
80 SHS ABBOTT LABORATORIES	D	1973-10-17	2019-11-15
25 SHS ABBOTT LABORATORIES	D	1973-07-06	2019-11-19

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)
6,716		19	6,697
8,242		23	8,219
406		1	405
1,463		4	1,459
5,445		16	5,429
2,770		8	2,762
10,492		30	10,462
3,525		10	3,515
6,792		18	6,774
2,107		6	2,101

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	
			6,697
			8,219
			405
			1,459
			5,429
			2,762
			10,462
			3,515
			6,774
			2,101

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

List and describe the kind(s) of property sold (e.g., real estate, (a) 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.)
75 SHS APACHE CORP	P	2005-10-17	2019-11-12
25 SHS APACHE CORP	P	2007-03-09	2019-11-12
375 SHS KINDER MORGAN INC	P	2014-05-02	2019-11-12
74 SHS MICROSOFT CORP	D	1994-02-23	2019-11-27
75 SHS SCHLUMBERGER LTD	P	2015-03-27	2019-11-12

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)
1,790		4,902	-3,112
597		1,728	-1,131
7,485		12,010	-4,525
11,265		188	11,077
2,754		6,246	-3,492

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	
			-3,112
			-1,131
			-4,525
			11,077
			-3,492

Form 990PF Part XV Line 1a - 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).

HENRY P PHIPPEN
WILLIAM L PHIPPEN
PETER D PHIPPEN

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ACCORD FOOD PANTRY69 WILLOW ST HAMILTON, MA 01982	NONE	NONE	SOCIAL	950
ALUMNAE FUND OF SMITH COLLEGE ELM ST NORTHAMPTON, MA 01063	NONE	NONE	EDUCATIONAL	500
AMERICAN RED CROSS 285 COLUMBUS AVE BOSTON, MA 02116	NONE	NONE	SOCIAL	250
Total ▶ 3a				56,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ASSUMPTION GREEK ORTHODOX CHURCH 111 ISLAND POND ROAD MANCHESTER, NH 03109	NONE	NONE	RELIGIOUS	750
BEVERLY BOOTSTRAPS221 CABOT ST BEVERLY, MA 01915	NONE	NONE	SOCIAL	250
BEVERLY HOSPITAL85 HERRICK STREET BEVERLY FARMS, MA 01915	NONE	NONE	MEDICAL	500
Total ▶ 3a				56,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BOSTON SYMPHONY ORCHESTRA 301 MASSACHUSETTS AVE BOSTON, MA 02115	NONE	NONE	EDUCATIONAL	500
BROOKWOOD SCHOOL ONE BROOKWOOD RD MANCHESTER, MA 01944	NONE	NONE	EDUCATIONAL	100
CAPE ANN ANIMAL AID4 PAWS LANE GLOUCESTER, MA 01930	NONE	NONE	HUMANITARIAN	250
Total ▶ 3a				56,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
CENTER FOR PLANT CONSERVATION PO BOX 229 ST LOUIS, MO 63166	NONE	NONE	EDUCATIONAL	250
CHRIST CHURCH OF HAMILTON AND WENHAM 149 ASHBURY ST SOUTH HAMILTON, MA 01982	NONE	NONE	RELIGIOUS	750
BEVERLY EDUCATION FOUNDATION PO BOX 407 BEVERLY, MA 01915	NONE	NONE	EDUCATIONAL	200
Total ▶ 3a				56,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
DOCTORS WITHOUT BORDERS 333 7TH AVE - 2ND FLOOR NEW YORK, NY 100015004	NONE	NONE	MEDICAL	250
ESSEX COUNTY GREENBELT ASSOCIATION 82 EASTERN AVE ESSEX, MA 01929	NONE	NONE	CONSERVATION	11,350
ESSEX COUNTY TRAIL 162 MAIN STREET STE 5 WENHAM, MA 01984	NONE	NONE	CONSERVATION	500
Total ▶ 3a				56,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ESSEX NATIONAL HERITAGE 12 FEDERAL STREET STE 12 SALEM, MA 01970	NONE	NONE	5CONSERVATION	500
EXPRESS YOURSELF6 ELLIS ST PEABODY, MA 01960	NONE	NONE	SOCIAL	100
FAMILY PROMISE NORTH SHORE BOSTON 330 RANTOUL ST BEVERLY, MA 01915	NONE	NONE	SOCIAL	450
Total ▶ 3a				56,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
FARMS-PRIDES COMMUNITY ASSOC 14 OAK ST BEVERLY, MA 01915	NONE	NONE	SOCIAL	100
FIRST CHURCH OF CHRIST SCIENTIST 887 CONCORD ST FRAMINGHAM, MA 01701	NONE	NONE	RELIGIOUS	200
FIRST UNIVERSALIST CHURCH OF ESSEX 59 MAIN ST ESSEX, MA 01929	NONE	NONE	RELIGIOUS	250
Total ▶ 3a				56,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
GLEN URQUHART SCHOOL74 HART ST BEVERLY FARMS, MA 01915	NONE	NONE	EDUCATIONAL	1,500
GLOBE SANTA FUNDPO BOX 845059 BOSTON, MA 02284	NONE	NONE	SOCIAL	500
GOVERNOR'S ACADEMY1 ELM STREET BYFIELD, MA 01922	NONE	NONE	EDUCATION	8,500
Total ► 3a				56,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
GREENPEACE702 H ST NW WASHINGTON, DC 20001	NONE	NONE	ENVIRONMENTAL	250
HARTWICK COLLEGE1 HARTWICK DR ONEONTA, NY 13870	NONE	NONE	EDUCATIONAL	250
IPSWICH RIVER WATERSHED ASSOCIATION INC 240 COUNTY RD IPSWICH, MA 01938	NONE	NONE	CONSERVATION	1,750
Total ▶ 3a				56,500

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MAD RIVER PATH ASSOCIATION 4061 MAIN ST WAITSFIELD, VT 05673	NONE	NONE	CONSERVATION	250
MAD RIVER VALLEY COMMUNITY FUND 5223 MAIN ST WAITSFIELD, VT 05673	NONE	NONE	CONSERVATION	1,000
MAKE-A-WISH FOUNDATION 1 BULFINCH PLACE BOSTON, MA 02114	NONE	NONE	SOCIAL	500
Total ▶ 3a				56,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MARY BAKER EDDY LIBRARY 200 MASSACHUSETTS AVE BOSTON, MA 02115	NONE	NONE	EDUCATIONALEducational	100
MASSACHUSETTS AUDUBON SOCIETY 208 SOUTH GREAT RD LINCOLN, MA 01773	NONE	NONE	CONSERVATION	600
HEIFER INTERNATIONAL1 WORLD AVE LITTLE ROCK, AR 72202	NONE	NONE	SOCIAL	450
Total ▶ 3a				56,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
NORTH SHORE MEDICAL CENTER 81 HIGHLAND AVE SALEM, MA 01970	NONE	NONE	MEDICAL	500
NORTH SHORE NORDIC ASSOCIATION PO BOX 2101 SOUTH HAMILTON, MA 01980	NONE	NONE	SOCIAL	500
NOTRE DAME CHILDREN'S CLASS 74 GRAPEVINE RD WENHAM, MA 01984	NONE	NONE	EDUCATIONAL	500
Total ▶ 3a				56,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
HELLENIC CARDIAC FUND 5204 WASHINGTON ST WEST ROXBURY, MA 02132	NONE	NONE	HEALTH	250
PEABODY ESSEX MUSEUM 161 ESSEX ST E INDIA SQUARE SALEM, MA 01970	NONE	NONE	CULTURAL	750
PINGREE SCHOOL537 HIGHLAND AVE SOUTH HAMILTON, MA 01982	NONE	NONE	EDUCATIONAL	1,000
Total ▶ 3a				56,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
PLANNED PARENTHOOD FEDERATION OF AMERICA 1055 COMMONWEALTH AVE BOSTON, MA 02215	NONE	NONE	HEALTH	1,450
HAMILTON WENHAM EDFUND PO BOX 2433 SOUTH HAMILTON, MA 01982	NONE	NONE	EDUCATIONAL	250
PRINCIPIA COLLEGE13201 CLAYTON RD ST LOUIS, MO 63131	NONE	NONE	EDUCATIONAL	100
Total ▶ 3a				56,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
PROJECT BREAD138 MAIN ST WENHAM, MA 01984	NONE	NONE	SOCIAL	250
CAPE ANN FOOD PANTRY 23 EMERSON AVE GLOUCESTER, MA 01930	NONE	NONE	SOCIAL	250
SEWPPOORTIVE FRIENDSPO BOX 5223 BEVERLY FARMS, MA 01915	NONE	NONE	SOCIAL	4,200
Total ▶ 3a				56,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
SOS CHILDREN'S VILLAGES 84 STATE ST BOSTON, MA 02109	NONE	NONE	HUMANITARIUM	200
THE FOOD PROJECT112 SOHIER RD BEVERLY, MA 01915	NONE	NONE	SOCIAL	1,000
THE TOWN OF WENHAM - VETERANS WAR MEMORIAL 63 NORTH ST ANDOVER, NH 03216	NONE	NONE	EDUCATIONAL	250
Total ▶ 3a				56,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE TRUSTEES OF RESERVATIONS 572 ESSEX STREET BEVERLY, MA 01915	NONE	NONE	CONSERVATION	2,350
UNITED WAY OF CENTRAL MASSACHUSETTS 484 MAIN ST WORCESTER, MA 01608	NONE	NONE	SOCIAL	500
VERMONT LAND TRUST8 BAILEY AVE MONTPELIER, VT 05602	NONE	NONE	CONSERVATION	250
Total ▶ 3a				56,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
VICTORIA FALLS WILDLIFE TRUST PO BOX 23183 SAN DIEGO, CA 92193	NONE	NONE	ENVIRONMENTAL	500
WELLSPRING HOUSE 890 COMMONWEALTH AVE BOSTON, MA 02215	NONE	NONE	SOCIAL	500
WENHAM HISTORICAL ASSOCIATION AND MUSEUM 132 MAIN ST WENHAM, MA 01984	NONE	NONE	EDUCATIONAL	2,750
Total ▶ 3a				56,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
WILDLIFE CONSERVATION NETWORK 209 MISSISSIPPI STREET SAN FRANCISCO, CA 94107	NONE	NONE	CONSERVATION	250
WINDRUSH FARM30 BROOKVIEW RD BOXFORD, MA 01921	NONE	NONE	RELIGIOUS	2,850
WORLD WILDLIFE FUND INC 1250 24TH ST NW WASHINGTON, DC 20037	NONE	NONE	CONSERVATION	250
Total ▶ 3a				56,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
NATIONAL MULTIPLE SCLEROSIS 101 1ST AVE SUITE 6 WALTHAM, MA 02451	NONE	NONE	HEALTH	250
Total  3a				56,500

TY 2019 Accounting Fees Schedule**Name:** HURDLE HILL FOUNDATION

C/O WOODSTOCK SERVICES CO LLC

EIN: 04-6012782

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING SERVICES	5,000	3,333		1,667

TY 2019 Distribution from Corpus Election

Name: HURDLE HILL FOUNDATION
C/O WOODSTOCK SERVICES CO LLC

EIN: 04-6012782

Election: HURDLE HILL FOUNDATION 04-6012782 ATTACHMENT TO FORM 990PF 2018 IN ACCORDANCE WITH SECTIONS 4942(H)(2) AND REG. 53.4942(A)-3(C)(2) OF THE INTERNAL REVENUE CODE OF 1986, AS AMENDED, HURDLE HILL FOUNDATION HEREBY ELECTS TO TREAT CERTAIN CURRENT YEAR QUALIFYING DISTRIBUTIONS IN EXCESS OF THE PRECEDING TAX YEAR'S UNDISTRIBUTED INCOME AS BEING MADE FROM CORPUS. IN 2018 THE FOUNDATION RECEIVED \$55,567 IN CONTRIBUTIONS OF CASH AND SECURITIES FROM INDIVIDUALS. THE FOUNDATION'S DISTRIBUTABLE AMOUNT FOR 2018 WAS \$25,072. THE FOUNDATION MADE QUALIFYING DISTRIBUTIONS IN 2018 IN THE AMOUNT OF \$55,766. DISTRIBUTIONS OUT OF CORPUS (TO WHICH THIS ELECTION APPLIES) WITH RESPECT TO 2018 CONTRIBUTIONS RECEIVED TO SATISFY THE REQUIREMENTS OF SECTION 170(B)(1)(F) & 4942(G)(3) WERE \$55,766. THE AMOUNT OF QUALIFYING DIST. APPLIED TO THE 2018 DISTRIBUTABLE AMOUNT TOTALLED \$ 0 EXCESS DIST. CARRYOVER APPLIED TO THE 2017 DISTRIBUTABLE AMOUNT TOTALLED \$25,072. EXCESS DIST. CARRYOVER TO 2019 IS \$179,403

TY 2019 Investments Corporate Stock Schedule

Name: HURDLE HILL FOUNDATION
 C/O WOODSTOCK SERVICES CO LLC
 EIN: 04-6012782

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
125 ISHARES MSCI EAFE ETF	8,919	8,680
44 SHS ALLERGAN PLC	13,493	8,411
175 SHS MEDTRONIC PLC	13,145	19,854
75 SHS CHUBB LTD COM NPV	8,331	11,675
255 SHS ABBOTT LABORATORIES	18,929	22,149
10 SHS ALPHABET INC CLC	2,318	13,370
10 SHS ALPHABET INC CLA	2,317	13,394
50 SHS AUTOMATIC DATA PROCESSING	2,348	8,525
200 SHS BP PLC SPONS ADR	10,889	7,548
75 SHS BERKSHIRE HATHAWAY INC CLB	12,767	16,988
225 SHS CVS HEALTH CORP	6,602	16,715
250 SHS CISCO SYSTEM INC	5,146	11,990
100 SHS ECOLAB INC	4,564	19,299
300 SHS EXXON MOBIL CORP	22,210	20,934
45 SHS ILLINOIS TOOL WORKS	5,088	8,083
50 SHS INTUITIVE SURGICAL INC	1,975	29,558
125 SHS MCCORMICK & CO INC	4,206	21,216
65 SHS MCDONALDS CORP	11,742	12,845
150 SHS MERCK & CO NEW	5,008	13,643
250 SHS MICROSOFT CORP	17,792	39,425
75 SHS OREILLY AUTOMOTIVE INC	4,289	32,870
275 SHS ORACLE CORP	8,885	14,569
170 SHS PEPSICO	9,894	23,234
341 SHS PFIZER INC	8,338	13,360
100 SHS PROCTER AND GAMBLE CO	6,609	12,490
200 SHS STATE STREET CORP	11,521	15,820
100 SHS UNITED TECHNOLOGIES CORP	11,169	14,976
150 SHS VERIZON COMMUNICATIONS	7,659	9,210
250 SHS FORTINET	10,007	26,690
125 SHS JP MORGAN CHASE	12,972	17,425

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
140 SHS UBIQUTI	8,681	26,457
100 SHS APPLE INC	20,071	29,365
500 SHS BANK OF AMERICA	14,585	17,610
250 SHS FLOWSERVE CORP	13,591	12,442
60 SHS HOME DEPOT INC	11,312	13,103
65 SHS LIGAND PHARMACEUTICALS	11,324	6,779
150 SHS OMNICOM GROUP INC	11,424	12,153
200 SHS QUALCOMM INC	11,776	17,646
40 SHS ROPER TECHNOLOGIES INC	11,845	14,169
80 SHS VISA INC CL A	11,606	15,032

TY 2019 Other Decreases Schedule**Name:** HURDLE HILL FOUNDATION

C/O WOODSTOCK SERVICES CO LLC

EIN: 04-6012782

Description	Amount
ROUNDING	2

TY 2019 Other Expenses Schedule**Name:** HURDLE HILL FOUNDATION

C/O WOODSTOCK SERVICES CO LLC

EIN: 04-6012782**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BP PLC SPONS ADR FEE	4	4		0
MA FORM PC FILING FEE	35	0		35

TY 2019 Other Professional Fees Schedule**Name:** HURDLE HILL FOUNDATION

C/O WOODSTOCK SERVICES CO LLC

EIN: 04-6012782

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TRUSTEES FEES	6,072	4,048		2,024

TY 2019 Taxes Schedule

Name: HURDLE HILL FOUNDATION
C/O WOODSTOCK SERVICES CO LLC

EIN: 04-6012782

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES WITHHELD	21	21		0
FEDERAL PVT FOUNDATION EXCISE TAXES	4,110	0		0

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 <u>www.irs.gov/Form990</u> for the latest information.	OMB No. 1545-0047
		2019
Name of the organization HURDLE HILL FOUNDATION C/O WOODSTOCK SERVICES CO LLC		Employer identification number 04-6012782

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 33¹/₃% 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 HURDLE HILL FOUNDATION C/O WOODSTOCK SERVICES CO LLC	Employer identification number 04-6012782
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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
—	See Additional Data Table _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution.)
—	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution.)
—	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution.)
—	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution.)
—	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution.)
—	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution.)
—	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution.)
—	_____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution.)

Name of organization HURDLE HILL FOUNDATION C/O WOODSTOCK SERVICES CO LLC	Employer identification number 04-6012782
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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
—	See Additional Data Table	\$	
(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 HURDLE HILL FOUNDATION C/O WOODSTOCK SERVICES CO LLC	Employer identification number 04-6012782
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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

Additional Data

Software ID:
Software Version:
EIN: 04-6012782
Name: HURDLE HILL FOUNDATION
C/O WOODSTOCK SERVICES CO LLC

Form 990 Schedule B, 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
<u>1</u>	WILLIAM L PHIPPEN	<u>\$ 16,616</u>	Person ☐
	WOODSTOCK SERVICES CO LLC 101 ARCH		Payroll ☐
	BOSTON, MA 02110		Noncash ☒ (Complete Part II for noncash contribution.)
<u>2</u>	DAVID O PHIPPEN	<u>\$ 6,708</u>	Person ☐
	WOODSTOCK SERVICES CO LLC 101 ARCH		Payroll ☐
	BOSTON, MA 02110		Noncash ☒ (Complete Part II for noncash contribution.)
<u>3</u>	ANNE W PHIPPEN	<u>\$ 6,744</u>	Person ☐
	WOODSTOCK SERVICES CO LLC 101 ARCH		Payroll ☐
	BOSTON, MA 02110		Noncash ☒ (Complete Part II for noncash contribution.)
<u>4</u>	JOANNA L PHIPPEN	<u>\$ 11,147</u>	Person ☐
	WOODSTOCK SERVICES CO LLC 101 ARCH		Payroll ☐
	BOSTON, MA 02110		Noncash ☒ (Complete Part II for noncash contribution.)
<u>5</u>	HENRY P PHIPPEN	<u>\$ 8,173</u>	Person ☐
	WOODSTOCK SERVICES CO LLC 101 ARCH		Payroll ☐
	BOSTON, MA 02110		Noncash ☒ (Complete Part II for noncash contribution.)
<u>6</u>	PETER D PHIPPEN	<u>\$ 7,695</u>	Person ☐
	WOODSTOCK SERVICES CO LLC 101 ARCH		Payroll ☐
	BOSTON, MA 02110		Noncash ☒ (Complete Part II for noncash contribution.)

Form 990 Schedule B, 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
7	SUSANNA L MANGINIS	<u>\$ 2,126</u>	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contribution.)
	WOODSTOCK SERVICES CO LLC 101 ARCH		
	BOSTON, MA 02110		

Form 990 Schedule B, 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
<u>1</u>	200 SHS ABBOTT LABORATORIES	<u>\$ 16,616</u>	<u>2019-10-24</u>
<u>2</u>	80 SHS ABBOTT LABORATORIES	<u>\$ 6,708</u>	<u>2019-11-13</u>
<u>3</u>	85 SHS ABBOTT LABORATORIES	<u>\$ 6,744</u>	<u>2019-10-19</u>
<u>4</u>	74 SHS MICROSOFT CORP	<u>\$ 11,147</u>	<u>2019-11-25</u>
<u>5</u>	100 SHS ABBOTT LABORATORIES	<u>\$ 8,173</u>	<u>2019-10-15</u>
<u>6</u>	95 SHS ABBOTT LABORATORIES	<u>\$ 7,695</u>	<u>2019-10-23</u>
<u>7</u>	25 SHS ABBOTT LABORATORIES	<u>\$ 2,126</u>	<u>2019-11-15</u>