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

OMB No 1545-0047

**2019**Department of the Treasury  
Internal Revenue Service

► Do not enter social security numbers on this form as it may be made public.  
► Go to [www.irs.gov/Form990PF](http://www.irs.gov/Form990PF) for instructions and the latest information.

Open to Public Inspection

For calendar year 2019 or tax year beginning , and ending

Name of foundation <b>ABBOT &amp; DOROTHY H. STEVENS FOUNDATION</b>		A Employer identification number <b>04-6107991</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>P.O. BOX 111</b>	Room/suite	B Telephone number (see instructions) <b>978-688-7211</b>
City or town, state or province, country, and ZIP or foreign postal code <b>NORTH ANDOVER MA 01845</b>		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1 Foreign organizations, check here <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <b>\$ 26,508,846</b> (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 <input type="checkbox"/>
J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)		

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	510,173	510,173		
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	738,342			
b	Gross sales price for all assets on line 6a <b>3,047,990</b>				
7	Capital gain net income (from Part IV, line 2)		738,342		
8	Net short-term capital gain			0	
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) <b>STMT 1</b>	707,324	698,410		
12	Total. Add lines 1 through 11	1,955,839	1,946,925	0	
13	Compensation of officers, directors, trustees, etc	0			
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule)				
b	Accounting fees (attach schedule) <b>STMT 2</b>	5,685			5,685
c	Other professional fees (attach schedule) <b>STMT 3</b>	112,452	112,452		
17	Interest				
18	Taxes (attach schedule) (see instructions) <b>STMT 4</b>	24,690	24,190		500
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses (att sch) <b>STMT 5</b>	207,072	92,922		114,150
24	Total operating and administrative expenses. Add lines 13 through 23	349,899	229,564	0	120,335
25	Contributions, gifts, grants paid	1,312,871			1,312,871
26	Total expenses and disbursements. Add lines 24 and 25	1,662,770	229,564	0	1,433,206
27	Subtract line 26 from line 12				
a	Excess of revenue over expenses and disbursements	293,069			
b	Net investment income (if negative, enter -0-)		1,717,361		
c	Adjusted net income (if negative, enter -0-)			0	

For Paperwork Reduction Act Notice, see instructions.

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash – non-interest-bearing	6,350	11,144	11,144
	2 Savings and temporary cash investments	1,894,313	1,471,556	1,471,556
	3 Accounts receivable ▶ Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶ Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (att schedule) ▶ Less allowance for doubtful accounts ▶	0		
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments – U S and state government obligations (attach schedule)			
	b Investments – corporate stock (attach schedule) <b>SEE STMT 6</b>	12,835,936	12,641,446	17,813,972
	c Investments – corporate bonds (attach schedule) <b>SEE STMT 7</b>	6,424,169	7,147,240	7,118,674
	11 Investments – land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch) ▶			
	12 Investments – mortgage loans			
	13 Investments – other (attach schedule)			
Liabilities	14 Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch) ▶			
	15 Other assets (describe ▶ <b>SEE STATEMENT 8</b> )		93,500	93,500
	16 Total assets (to be completed by all filers – see the instructions Also, see page 1, item I)	21,160,768	21,364,886	26,508,846
	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 ▶ <b>SEE STATEMENT 9</b> )	43,514		
	23 Total liabilities (add lines 17 through 22)	43,514	0	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here and complete lines 24, 25, 29, and 30. ▶ <input checked="" type="checkbox"/>			
	24 Net assets without donor restrictions	21,117,254	21,364,886	
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here and complete lines 26 through 30. ▶ <input type="checkbox"/>			
	26 Capital stock, trust principal, or current funds			
	27 Paid-in or capital surplus, or land, bldg, and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds			
	29 Total net assets or fund balances (see instructions)	21,117,254	21,364,886	
	30 Total liabilities and net assets/fund balances (see instructions)	21,160,768	21,364,886	

## 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	21,117,254
2 Enter amount from Part I, line 27a	2	293,069
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	21,410,323
5 Decreases not included in line 2 (itemize) ▶ <b>SEE STATEMENT 10</b>	5	45,437
6 Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 29	6	21,364,886

**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.)
<b>1a PUBLICLY TRADED SECURITIES</b>		<b>P</b>	<b>VARIOUS</b>	<b>VARIOUS</b>
<b>b PUBLICLY TRADED SECURITIES</b>		<b>P</b>	<b>VARIOUS</b>	<b>VARIOUS</b>
<b>c BBH FORM 1099-DIV</b>				
<b>d UNRECAPTURED SECTION 1250</b>				
<b>e</b>				

(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))
<b>a 395,382</b>		<b>314,426</b>	<b>80,956</b>
<b>b 2,589,894</b>		<b>1,995,222</b>	<b>594,672</b>
<b>c 62,714</b>			<b>62,714</b>
<b>d</b>			
<b>e</b>			

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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
<b>a</b>			<b>80,956</b>
<b>b</b>			<b>594,672</b>
<b>c</b>			<b>62,714</b>
<b>d</b>			
<b>e</b>			

<b>2</b> Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	<b>2</b>	<b>738,342</b>
<b>3</b> 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		<b>3</b>	<b>80,956</b>

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2018	1,849,747	24,784,574	0.074633
2017	1,860,706	23,529,873	0.079078
2016	1,886,772	30,002,079	0.062888
2015	1,432,109	24,595,483	0.058227
2014	1,210,850	25,315,994	0.047829

<b>2</b> Total of line 1, column (d)	<b>2</b>	<b>0.322655</b>
<b>3</b> 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	<b>3</b>	<b>0.064531</b>
<b>4</b> Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	<b>4</b>	<b>25,171,631</b>
<b>5</b> Multiply line 4 by line 3	<b>5</b>	<b>1,624,351</b>
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	<b>17,174</b>
<b>7</b> Add lines 5 and 6	<b>7</b>	<b>1,641,525</b>
<b>8</b> Enter qualifying distributions from Part XII, line 4 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.	<b>8</b>	<b>2,033,727</b>

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter (attach copy of letter if necessary—see instructions)	1	17,174
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		
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	17,174
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	17,174
6	Credits/Payments		
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	34,253
b	Exempt foreign organizations – tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	34,253
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	17,079
11	Enter the amount of line 10 to be Credited to 2020 estimated tax <input type="checkbox"/> 17,079 Refunded <input type="checkbox"/>	11	

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input type="checkbox"/> \$ (2) On foundation managers <input type="checkbox"/> \$		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions <b>MA</b>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the tax year beginning in 2019? See instructions for Part XIV. If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

**Part VII-A Statements Regarding Activities (continued)**

	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 ► N/A	X	
14 The books are in care of ► <b>JOSHUA L. MINER</b> P.O. BOX 111 Located at ► NORTH ANDOVER MA ZIP+4 ► 01845 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? See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the name of the foreign country ►		X

**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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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	N/A	
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? If "Yes," list the years ► 20 , 20 , 20 , 20	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement – see instructions )	N/A	
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?	<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 )	N/A	
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)**

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

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, and foundation managers and their compensation. See instructions.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JOSHUA L. MINER 356 MAIN STREET BOXFORD MA 01921	TRUSTEE 0.00	0	0	0
DEBORAH D. PUTNAM 32 ARBOROUGH ROAD MA 02131	TRUSTEE 0.00	0	0	0
CHRISTOPHER W. ROGERS 46 OCEAN STREET NAHANT MA 01908	TRUSTEE 0.00	0	0	0

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
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
BROWN BROTHERS HARRIMAN 40 WATER STREET BOSTON MA 02110	INVESTMENT ADVI	112,452
Total number of others receiving over \$50,000 for professional services		0

**Part IX-A Summary of Direct Charitable Activities**

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

	Expenses
1 N/A	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

	Amount
1 N/A	
2	
Alt other program-related investments See instructions	
3	
Total. Add lines 1 through 3	

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	24,843,850
<b>b</b>	Average of monthly cash balances	<b>1b</b>	711,105
<b>c</b>	Fair market value of all other assets (see instructions)	<b>1c</b>	0
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	25,554,955
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	0
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	25,554,955
<b>4</b>	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	<b>4</b>	383,324
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	25,171,631
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	1,258,582

**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.)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	1,258,582
<b>2a</b>	Tax on investment income for 2019 from Part VI, line 5	<b>2a</b>	17,174
<b>b</b>	Income tax for 2019 (This does not include the tax from Part VI)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	17,174
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	1,241,408
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	
<b>5</b>	Add lines 3 and 4	<b>5</b>	1,241,408
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	
<b>7</b>	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	1,241,408

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b>	Expenses, contributions, gifts, etc. – total from Part I, column (d), line 26	<b>1a</b>	1,433,206
<b>b</b>	Program-related investments – total from Part IX-B	<b>1b</b>	
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	600,521
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	2,033,727
<b>5</b>	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	<b>5</b>	17,174
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	2,016,553

**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
<b>1</b> Distributable amount for 2019 from Part XI, line 7				<b>1,241,408</b>
<b>2</b> Undistributed income, if any, as of the end of 2019				
<b>a</b> Enter amount for 2018 only				
<b>b</b> Total for prior years 20____, 20____, 20____				
<b>3</b> Excess distributions carryover, if any, to 2019				
<b>a</b> From 2014				
<b>b</b> From 2015				<b>248,367</b>
<b>c</b> From 2016				<b>403,124</b>
<b>d</b> From 2017				<b>710,108</b>
<b>e</b> From 2018				<b>641,012</b>
<b>f</b> Total of lines 3a through e		<b>2,002,611</b>		
<b>4</b> Qualifying distributions for 2019 from Part XII, line 4 ▶ \$ <b>2,033,727</b>				
<b>a</b> Applied to 2018, but not more than line 2a				
<b>b</b> Applied to undistributed income of prior years (Election required – see instructions)				
<b>c</b> Treated as distributions out of corpus (Election required – see instructions)				
<b>d</b> Applied to 2019 distributable amount				<b>1,241,408</b>
<b>e</b> Remaining amount distributed out of corpus	<b>792,319</b>			
<b>5</b> Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a) )				
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	<b>2,794,930</b>			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b				
<b>c</b> 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				
<b>d</b> Subtract line 6c from line 6b Taxable amount – see instructions				
<b>e</b> Undistributed income for 2018 Subtract line 4a from line 2a Taxable amount – see instructions				
<b>f</b> Undistributed income for 2019 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2020				<b>0</b>
<b>7</b> 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)				
<b>8</b> Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions)				
<b>9</b> Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	<b>2,794,930</b>			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2015				<b>248,367</b>
<b>b</b> Excess from 2016				<b>403,124</b>
<b>c</b> Excess from 2017				<b>710,108</b>
<b>d</b> Excess from 2018				<b>641,012</b>
<b>e</b> Excess from 2019				<b>792,319</b>

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

**1a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2019, enter the date of the ruling ▶

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

	Tax year	Prior 3 years			(e) Total
	(a) 2019	(b) 2018	(c) 2017	(d) 2016	
<b>2a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
<b>b</b> 85% of line 2a					
<b>c</b> Qualifying distributions from Part XII, line 4, for each year listed					
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
<b>3</b> Complete 3a, b, or c for the alternative test relied upon					
<b>a</b> "Assets" alternative test – enter					
<b>(1)</b> Value of all assets					
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i)					
<b>b</b> "Endowment" alternative test – enter 2/3 of minimum investment return shown in Part X, line 6, for each year listed					
<b>c</b> "Support" alternative test – enter					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
<b>(3)</b> Largest amount of support from an exempt organization					
<b>(4)</b> Gross investment income					

**Part XV Supplementary Information** (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year – see instructions.)**1 Information Regarding Foundation Managers:**

**a** List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2) )  
**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  
**JOSHUA L. MINER 978-688-7211**  
**P.O. BOX 111 NORTH ANDOVER MA 01845**

**b** The form in which applications should be submitted and information and materials they should include  
**SEE ATTACHED STATEMENT**

**c** Any submission deadlines  
**SEE ATTACHED STATEMENT**

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

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a</b> <i>Paid during the year</i> <b>SEE ATTACHED SCHEDULE</b>	<b>UNRELATED</b>	<b>501(C)(3)</b> <b>CHARITABLE PURPOSE</b>	<b>CHARITABLE PURPOSE</b>	<b>1,312,871</b>
<b>Total</b>				<b>▶ 3a 1,312,871</b>
<b>b</b> <i>Approved for future payment</i> <b>SEE ATTACHED SCHEDULE</b>	<b>UNRELATED</b>	<b>501(C)(3)</b> <b>CHARITABLE PURPOSE</b>	<b>CHARITABLE PURPOSE</b>	<b>445,000</b>
<b>Total</b>				<b>▶ 3b 445,000</b>





## Federal Statements

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

Description	Revenue per Books	Net Investment Income	Adjusted Net Income
BBH K-1 ST CAPITAL GAIN	\$ 153,465	\$ 153,465	\$
BBH K-1 LT CAPITAL GAIN	544,945	544,945	
BBH WEALTH STRATEGIES K-1S	8,914		
TOTAL	\$ 707,324	\$ 698,410	\$ 0

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

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
ACCOUNTING FEES	\$ 5,685	\$	\$	\$ 5,685
TOTAL	\$ 5,685	\$ 0	\$ 0	\$ 5,685

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

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
INVESTMENT EXPENSES	\$ 112,452	\$ 112,452	\$	\$
TOTAL	\$ 112,452	\$ 112,452	\$ 0	\$ 0

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

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
STATE FILING FEE	\$ 500	\$	\$	\$ 500
FOREIGN TAX	6,588	6,588		
BBH K-1S FOREIGN TAX	17,602	17,602		
TOTAL	\$ 24,690	\$ 24,190	\$ 0	\$ 500

## Federal Statements

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

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXPENSES			\$	\$
OFFICE EXPENSE	108,000			108,000
BBH K-1S 2% FLOOR DEDUCTIONS	92,922	92,922		
DUES & SUBSCRIPTIONS	6,150			6,150
TOTAL	\$ 207,072	\$ 92,922	\$ 0	\$ 114,150

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

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
CORPORATE EQUITIES	\$ 12,835,936	\$ 12,641,446	COST	\$ 17,813,972
TOTAL	\$ 12,835,936	\$ 12,641,446		\$ 17,813,972

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

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
CORPORATE BONDS	\$ 6,424,169	\$ 7,147,240	COST	\$ 7,118,674
TOTAL	\$ 6,424,169	\$ 7,147,240		\$ 7,118,674

**Federal Statements****Statement 8 - Form 990-PF, Part II, Line 15 - Other Assets**

Description	Beginning of Year	End of Year	Fair Market Value
BOND COST BASIS ADJUSTMENT	\$	\$ 93,500	\$ 93,500
TOTAL	\$ 0	\$ 93,500	\$ 93,500

**Statement 9 - Form 990-PF, Part II, Line 22 - Other Liabilities**

Description	Beginning of Year	End of Year
BOND COST BASIS ADJUSTMENT	\$ 43,514	\$
TOTAL	\$ 43,514	\$ 0

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

Description	Amount
NONDEDUCTIBLE EXPENSE	\$ 587
FEDERAL TAXES	44,850
TOTAL	\$ 45,437

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

Description
SEE ATTACHED STATEMENT

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

Description
SEE ATTACHED STATEMENT

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

Description
SEE ATTACHED STATEMENT



<b>Underdistribution and Excess Distributions for Part XIII</b>		<b>2019</b>
Form <b>990-PF</b>	For calendar year 2019, or tax year beginning _____, ending _____	
Name <b>ABBOT &amp; DOROTHY H. STEVENS FOUNDATION</b>		Employer Identification Number <b>04-6107991</b>

### Undistributed Income Carryovers

Form 990-PF, Part XIII

Tax Year	Prior Undistributed Income			Current Year Decreases	Next Year Carryover	
	Nontaxable or Previously Taxed	Taxable in 2019	Total per Year		Nontaxable or, Previously Taxed	Taxable in 2020
Years prior						
20 15						
20 16						
20 17						
2018						
2019			1,241,408	1,241,408		
Total Carryover to Next Year						0

\* Carryover amount includes 4942(a) amounts

### Excess Distribution Carryovers

Form 990-PF, Part XIII

Preceding Tax Year Excess Distributions	Current Year Decreases	Next Year Carryover
2014		
2015 248,367		248,367
2016 403,124		403,124
2017 710,108		710,108
2018 641,012		641,012
Current Year Excess Distribution Generated (2019)		792,319
Total Carryover to Next Year		2,794,930

EIN#: 04-6107991

TAX YEAR: 2019

**STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARTABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST**

**PROJECT #1 – LAWRENCE HIGH SCHOOL 10<sup>TH</sup> GRADE ACADEMY**

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

<u>NAME</u>	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
LAWRENCE HIGH SCHOOL 10 <sup>TH</sup> GRADE ACADEMY	\$521	SCHOOL PROGRAM AT EDGEWOOD FARM IN NORTH ANDOVER
70-71 NORTH PARISH RD		
LAWRENCE, MA 01843		

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

	<u>YEAR</u>	<u>AMOUNT</u>
LAWRENCE HIGH SCHOOL 10 <sup>TH</sup> GRADE ACADEMY	2018	\$1,041
	2019	521
	2020	521
	TOTAL	\$2,083

EIN#: 04-6107991

TAX YEAR: 2019

**STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARTABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST**

**PROJECT #2 – MERRIMACK RIVER WATERSHED COUNCIL**

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

<u>NAME</u>	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
MERRIMACK RIVER WATERSHED COUNCIL	\$40,000	ASSIST MRWC IN HIRING AN EXECUTIVE DIRECTOR
60 ISLAND STREET, SUITE 211-E		
LAWRENCE, MA 01840		

2. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2020 AND 2021 WHICH ARE PERIODS THAT END NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.
3. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).
4. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.
5. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

<u>NAME</u>	<u>YEAR</u>	<u>AMOUNT</u>
MERRIMACK RIVER WATERSHED COUNCIL	2019	\$20,000
	2020	20,000
	2021	20,000
	TOTAL	\$60,000

EIN#: 04-6107991

TAX YEAR: 2019

**STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARTABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST**

PROJECT #3 – PINGREE SCHOOL FOR PREP@PINGREE

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

<u>NAME</u>	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
PINGREE SCHOOL FOR PREP@PINGREE	\$30,000	FOR LAWRENCE STUDENTS
537 HIGHLAND STREET		
SOUTH HAMILTON, MA 01982		

7. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2020 AND 2021 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.
8. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).
9. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.
10. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

<u>NAME</u>	<u>YEAR</u>	<u>AMOUNT</u>
PINGREE SCHOOL FOR PREP@PINGREE	2019	\$15,000
	2020	15,000
	2021	15,000
	TOTAL	\$45,000

EIN#: 04-6107991

TAX YEAR: 2019

**STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARTABLE  
PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST**

**PROJECT #4 – LAWRENCE GENERAL HOSPITAL**

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

<u>NAME</u>	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
LAWRENCE GENERAL HOSPITAL	\$50,000	NEW SURGICAL CENTER & RENOVATIONS
PO BOX 189		
LAWRENCE, MA 01842		

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

<u>NAME</u>	<u>YEAR</u>	<u>AMOUNT</u>
LAWRENCE GENERAL HOSPITAL	2016	\$50,000
	2017	50,000
	2018	50,000
	2019	50,000
	2020	50,000
	TOTAL	\$250,000

EIN#: 04-6107991

TAX YEAR: 2019

**STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARITABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST**

**PROJECT #5 – APPALACHIAN MOUNTAIN CLUB**

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

<b><u>NAME</u></b>	<b><u>AMOUNT</u></b>	<b><u>PURPOSE OF THE PROJECT</u></b>
APPALACHIAN MOUNTAIN CLUB	\$30,000	YOUTH OPPORTUNITIES PROGRAM – LAWRENCE & LOWELL
5 JOY STREET		
BOSTON, MA 02108		

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

<b><u>NAME</u></b>	<b><u>YEAR</u></b>	<b><u>AMOUNT</u></b>
APPALACHIAN MOUNTAIN CLUB	2018	\$40,000
	2019	30,000
	2020	30,000
	TOTAL	\$100,000

EIN#: 04-6107991

TAX YEAR: 2019

**STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARITABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST**

**PROJECT #6 – NORTHERN ESSEX COMMUNITY COLLEGE**

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

<u>NAME</u>	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
NORTHERN ESSEX COMMUNITY COLLEGE	\$200,000	CAPITAL SUPPORT
100 ELLIOTT STREET		
HAVERHILL, MA 01830		

12. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2020, 2021, 2022 AND 2023 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.

13. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).

14. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.

15. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

<u>NAME</u>	<u>YEAR</u>	<u>AMOUNT</u>
NORTHERN ESSEX COMMUNITY COLLEGE	2019	\$50,000
	2020	50,000
	2021	50,000
	2022	50,000
	2023	50,000
	TOTAL	\$250,000

EIN#: 04-6107991

TAX YEAR: 2019

**STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARITABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST**

**PROJECT #7 – MERRIMACK VALLEY YMCA – ANDOVER NORTH ANDOVER BRANCH**

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

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

17. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2020 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.

18. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).

19. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.

20. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

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



EIN#: 04-6107991

TAX YEAR: 2019

**STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARITABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST**

**PROJECT #8 – ELEVATED THOUGHT FOUNDATION**

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

<u>NAME</u>	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
ELEVATED THOUGHT FOUNDATION	\$40,000	CAPACITY BUILDING
22 HEATHER DRIVE		
METHUEN, MA 01844		

22. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2020 AND 2021 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.

23. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).

24. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.

25. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

<u>NAME</u>	<u>YEAR</u>	<u>AMOUNT</u>
ELEVATED THOUGHT FOUNDATION	2019	\$50,000
	2020	25,000
	2021	15,000
	TOTAL	\$90,000

EIN#: 04-6107991

TAX YEAR: 2019

**STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARITABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST**

**PROJECT #9 – INSTITUTE FOR NON-PROFIT MANAGEMENT**

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

<u>NAME</u>	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
INSTITUTE FOR NON-PROFIT MANAGEMENT	\$70,000	ALUMNI PROGRAMMING AND FELLOWSHIPS
51 SLEEPER STREET		
BOSTON, MA 02210		

27. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2020 AND 2021 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.

28. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).

29. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.

30. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

<u>NAME</u>	<u>YEAR</u>	<u>AMOUNT</u>
INSTITUTE FOR NON-PROFIT MANAGEMENT	2019	\$35,000
	2020	35,000
	2021	35,000
	TOTAL	\$105,000

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TAX YEAR: 2019

**STATEMENT 9 – FORM 990-PF PART XII, LINE 3b AMOUNT SET ASIDE FOR SPECIFIC CHARITABLE PROJECTS THAT SATISFY THE CASH DISTRIBUTION TEST**

**PROJECT #10 – LAWRENCE COMMUNITY WORKS**

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

<u>NAME</u>	<u>AMOUNT</u>	<u>PURPOSE OF THE PROJECT</u>
LAWRENCE COMMUNITY WORKS	\$65,000	GENERAL OPERATING SUPPORT
168 NEWBURY STREET		
LAWRENCE, MA 01841		

32. THE ABOVE AMOUNTS WILL ACTUALLY BE PAID DURING 2020 WHICH IS A PERIOD THAT ENDS NO MORE THAN 60 MONTHS AFTER THE DATE OF THE SET-ASIDE.

33. THE PROJECT WILL NOT BE COMPLETED BEFORE THE END OF THE ABOVE-REFERENCED TAX YEAR (THE YEAR IN WHICH THE SET-ASIDE WAS MADE).

34. A STATEMENT SHOWING THE DISTRIBUTABLE AMOUNTS DETERMINED UNDER IRC SEC.4942(d) FOR ALL PAST TAX YEARS IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS. NOT APPLICABLE.

35. A STATEMENT SHOWING THE ACTUAL PAYMENTS MADE IN CASH FOR EXEMPT PURPOSES DURING EACH TAX YEAR IN THE TAXPAYER'S START-UP AND FULL PAYMENT PERIODS.

<u>NAME</u>	<u>YEAR</u>	<u>AMOUNT</u>
LAWRENCE COMMUNITY WORKS	2019	\$65,000
	2020	65,000
	TOTAL	\$130,000

**ABBOT & DOROTHY H. STEVENS FOUNDATION**  
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RECIPIENT		FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NAME AND ADDRESS				
Alzheimers Association 480 Pleasant Street Watertown, MA 02472		501(C)(3) Charitable Organization	general operating support	250 00
Boston Children's Museum Carole Charnow, Pres 308 Congress Street Boston, MA 02210		501(C)(3) Charitable Organization	sponsored visits Lawrence & Lowell	8,000 00
Boys & Girls Club of Lawrence Markus Fischer Exec Director 136 Water Street Lawrence, MA 01841		501(C)(3) Charitable Organization	operating support	1,500 00
Bread and Roses Housing Yesinia Gil, Exec Dir PO Box 7 Lawrence, MA 01840		501(C)(3) Charitable Organization	Affordable Homeownership program	25 000 00
Catholic Schools Foundation Michael Reardon, Exec Dir 260 Franklin Street Ste 630 Boston, MA 02110		501(C)(3) Charitable Organization	Inner-city Scholarship Fund Lawrence	18 000 00
ECCF Lawrence Emergency Fund 175 Andover Street - Suite 101 Danvers, MA 01923		501(C)(3) Charitable Organization	general operating support	1,000 00
ECCF Summer in Greater Lawrence Carol Schuster, Admin 175 Andover Street - Suite 101 Danvers, MA 01923		501(C)(3) Charitable Organization	summer 2019 support	50,000 00
Elevated Thought Foundation 22 Heather Drive Attn Lester Sydney, Co-Founder Methuen, MA 01844		501(C)(3) Charitable Organization	capacity building & operating support	50,000 00
Family Service, Inc Luz Sweeney, Exec Dir 430 No Canal Street Lawrence, MA 01840		501(C)(3) Charitable Organization	Samaritans & Youth Mentoring programs support	40 000 00
Friends of Pleasant Bay PO Box 1243 Haverich, MA 02645		501(C)(3) Charitable Organization	general operating support	200 00
Girls, Inc Cathilee Gable, Devel Manager 220 Worthen Street Lowell, MA 01852		501(C)(3) Charitable Organization	Early Literacy program	5,000 00
Handel & Haydn Society Louisa Trackman, Admin Dir Institut Gw 300 Massachusetts Ave Boston, MA 02115		501(C)(3) Charitable Organization	outreach to Lawrence	6,000 00
Home Health VNA John Albert Pres/CEO 360 Merrimack St , Bldg 9 Lawrence, MA 01843		501(C)(3) Charitable Organization	Falls Prevention	10,000 00
Hurricane Island Outward Bound School 41 Mechanic Street - Suite 313 Camden ME 04843		501(C)(3) Charitable Organization	Partnership with Aaron's Presents Scholarships	25 000 00

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RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
Institute for Non-Profit Management Audrey Gillis, Devel Director 51 Steeper Street Boston, MA 02210	501(C)(3) Charitable Organization	operating & Lawrence Fellowships	35,000 00
International Institute of New England Jeffrey Thielman, President/CEO 15-17 Warren St, 2nd Floor Lowell, MA 01852	501(C)(3) Charitable Organization	Refugee Employment Services Lowell	4,000 00
Lawrence Community Works Jessica Andors 168 Newbury Street Lawrence, MA 01841	501(C)(3) Charitable Organization	operating support	65,000 00
Lawrence Family Devel & Education Fund Ralph Carreno, Exec Dir 3 West Street Lawrence, MA 01841	501(C)(3) Charitable Organization	Quintana Citizenship Center Support	25,000 00
Lawrence High School 10th Grade Academy 70-71 North Parish Road Lawrence, MA	501(C)(3) Charitable Organization	Edgewood program	521 00
Lawrence History Center Susan Grabski, Ex Dir 6 Essex Street Lawrence, MA 01840	501(C)(3) Charitable Organization	general operating support	40,000 00
Lazarus House Bridget Shaheen, Ex Dir PO Box 408 Lawrence, MA 01842	501(C)(3) Charitable Organization	IT critical needs	10,000 00
Lowell Community Health Center Susan West Levine, CEO 161 Jackson Street Lowell, MA 01852	501(C)(3) Charitable Organization	WrapAround Fund support	10,000 00
LCW Mill Cities Leadership Inst Todd Fry, MCLI Director c/o Lawrence Community Works 168 Newbury Street Lawrence, MA 01841	501(C)(3) Charitable Organization	Class of 2020 Institute	12,000 00
Memmack River Watershed Council Christine Eckerl, Exec Dir 60 Island St, Suite 211-E Lawrence, MA 01840	501(C)(3) Charitable Organization	Advocacy programming, educational & science programming recreational Initiatives	15,000 00
Memmack Valley Immigrant Education Ctr Karen Shendan, Program Director 20 Ballard Road Lawrence, MA 01843	501(C)(3) Charitable Organization	operating & programming support	12,000 00
Memmack River Watershed Council Christine Eckerl, Exec Dir 60 Island St, Suite 211-E Lawrence, MA 01840	501(C)(3) Charitable Organization	Hire new Executive Director	20,000 00
Museum of Science Amy O'Doherty, Adv Officer Science Park Boston, MA 02114	501(C)(3) Charitable Organization	Lawrence visitors	7,500 00
Nahant Preservation Trust PO Box 30 Nahant, MA 01808	501(C)(3) Charitable Organization	general operating support	2,500 00

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RECIPIENT		FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NAME AND ADDRESS				
Nahant Village Church PO Box 77 Nahant, MA 01908		501(C)(3) Charitable Organization	Capital Campaign-Accessibility	10,000.00
Nahant Village Church PO Box 77 Nahant, MA 01908		501(C)(3) Charitable Organization	general operating support	2,500.00
Nevins Family of Services Joyce Shannon CEO 10-12 Ingalls Court Methuen, MA 01844		501(C)(3) Charitable Organization	purchase of orthopedic chairs & wheelchair height tables	15,000.00
New England Aquarium Benjamin Wind, Insit Gving Officer Central Wharf Boston, MA 02110		501(C)(3) Charitable Organization	Lawrence Free to Learn program	10,000.00
New Profit - Playworks Education Max Fripps, Executive Director 29 Germania Street Boston, MA 02130		501(C)(3) Charitable Organization	Lawrence programming & expansion in Lawrence	60,000.00
New Profit Inc. - Teach for America Josh Biber, Ex. Dir 60 Canal Street 3rd Fl Boston, MA 02114		501(C)(3) Charitable Organization	Teach for America Lawrence work	45,000.00
Notre Dame Cristo Rey High School Sister Maryabce Gilfeather, President 303 Havenhill Street Lawrence, MA 01840		501(C)(3) Charitable Organization	Corporate Work Study program in Lawrence non-profits	50,000.00
Northern Essex Community College 100 Elliott Street Haverhill, MA 01830		501(C)(3) Charitable Organization	scholarships & endowment AS only	50,000.00
Greater Lawrence Community Boating PO Box 955 Lawrence, MA 01842		501(C)(3) Charitable Organization	operating support	15,000.00
Greater Lawrence Community Boating PO Box 955 Lawrence, MA 01842		501(C)(3) Charitable Organization	operating support	2,500.00
Appalachian Mountain Club Margaret McNamara, Dir of Corp/Found 5 Joy Street Boston, MA 02108		501(C)(3) Charitable Organization	YOP Lawrence Lowell Summit site	30,000.00
Greater Lawrence Technical School 57 River Road, John Lavoie Andover, MA 01810		501(C)(3) Charitable Organization	capital for athletic facility renovations	75,000.00
Notre Dame Education Center Cynthia Fellner, Executive Director 354 Merrimack Street Suite 210 Lawrence, MA 01843		501(C)(3) Charitable Organization	ESOL programming	10,000.00
Phillips Academy - ABL Sharyn Bahn, 180 Main Street Andover, MA 01810		501(C)(3) Charitable Organization	Andover Breadloaf Writer's program support	25,000.00

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NAME AND ADDRESS				
Plummer Youth Promise 290 Merrimack Street, Suite 206 Attn Nicole McLaughlin, Acting ED Lawrence, MA 01843		501(C)(3) Charitable Organization	operating - Lawrence & Merrimack Valley Services	10,000 00
Phoenix Charter Academy Beth Anderson, CEO 60 Canal Street, 4th Floor Boston MA 02114		501(C)(3) Charitable Organization	Phoenix Academy Lawrence college & career pathways program support	10,000 00
Pike School 34 Sunset Rock Road Andover MA 01810		501(C)(3) Charitable Organization	general operating support	200 00
Boston Symphony Orchestra Symphony Hall Attn Ryan Lossey Boston, MA 02115		501(C)(3) Charitable Organization	Day in the Arts scholarship Lawrence youth	8,000 00
Philanthropy MA 133 Federal Street, #802 Boston MA 02110		501(C)(3) Charitable Organization	Future of Philanthropy campaign	5 000 00
Pingree School Prep @ Pingree Steve Flosa, Direct, PGP 537 Highland Street South Hamilton, MA 01982		501(C)(3) Charitable Organization	Prep @ Pingree Lawrence	15 000 00
Jeanne Gieger Crisis Center Suzanne Dubus, CEO 2 Harnish Street Newburyport, MA 01950		501(C)(3) Charitable Organization	Children's Safety Program Lawrence	5,000 00
Merrimack Valley YMCA Frank Kenneally, COO 360 Merrimack Street, Building 9 Suite 270 Lawrence, MA 01840		501(C)(3) Charitable Organization	Lawrence capital project	65,000 00
Plymouth Plantation Jill Tompkins, Inst Giving Manager PO Box 1620 Plymouth, MA 02362		501(C)(3) Charitable Organization	outreach to Lawrence	5,000 00
Project Hope 550 Dudley Street Roxbury MA 02119		501(C)(3) Charitable Organization	memory of Bernadine Murphy	1 500 00
Psychological Center 111 Union Street Attn Kelly Townsend Lawrence, MA 01840		501(C)(3) Charitable Organization	programming support - Women's View Daybreak Shelter & Pegasus House	8,000 00
Lawrence General Hospital William Parkinson, Dir of Devel PO Box 189 Lawrence, MA 01842		501(C)(3) Charitable Organization	capital - surgical building, renovation of inpatient & mammogram ctr	50,000 00
Old Sturbridge Village James Donahue, Pres/CEO 1 Sturbridge Village Road Sturbridge, MA 01566		501(C)(3) Charitable Organization	outreach to Lawrence	4,000 00
Reach Out and Read 89 South Street, Suite 201 Boston, MA 02111		501(C)(3) Charitable Organization	Lawrence programming	10 000 00

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RECIPIENT		FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NAME AND ADDRESS				
Regis College Antoinette Hays, President 235 Wellesley Street Weston, MA 02493		501(C)(3) Charitable Organization	nursing at Lawrence Catholic Academy	5,000.00
Boys & Girls Club of Gr Lowell Joseph Hungler, Exec Director 657 Middlesex Street Lowell, MA 01851		501(C)(3) Charitable Organization	Teen programming	15,000.00
Boys & Girls Club of Lawrence Markus Fischer, Exec Director 136 Water Street Lawrence, MA 01841		501(C)(3) Charitable Organization	operating and program support	25,000.00
Self Esteem Boston Marion Davis, President PO Box 301155 Jamaica Plain, MA 02130		501(C)(3) Charitable Organization	services in Lawrence	7 500.00
Seven & Eight Park Street Foundation 8 Park Street Boston MA 02108		501(C)(3) Charitable Organization	general operating support	1,000.00
Si Se Puede Lone Mendoza, Director PO Box 53 North Andover MA 01845		501(C)(3) Charitable Organization	general operating support	5,000.00
Squashbusters Greg Zaffi, Founder & Ex Dir 60 Island Street Lawrence, MA 01840		501(C)(3) Charitable Organization	Lawrence programming	10,000.00
Tabor Academy 66 Spring Street Marion, MA 02738		501(C)(3) Charitable Organization	general operating support	1,000.00
Jumpstart 308 Congress St Attn Katie Dick, Senior Dir of Donor Boston, MA 02210		501(C)(3) Charitable Organization	Lawrence programming	7,500.00
Junior Achievement of N NE Rad Nova President/CEO 400 Fifth Avenue Suite 300 Waltham, MA 02451		501(C)(3) Charitable Organization	Lawrence programming	13 500.00
Thompson Island Outward Bound Arthur Pearson, President PO Box 127 Boston, MA 02127		501(C)(3) Charitable Organization	Connections program Boston	5,000.00
Trinity Church 206 Clarendon Street Boston, MA 02116		501(C)(3) Charitable Organization	general operating support	100.00
Boston Children's Museum Carole Chamow Pres 308 Congress Street Boston, MA 02210		501(C)(3) Charitable Organization	operating support	5 000.00
Boston Children's Museum Carole Chamow, Pres 308 Congress Street Boston, MA 02210		501(C)(3) Charitable Organization	general operating support	1,000.00



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RECIPIENT		FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NAME AND ADDRESS				
U Aspire	Gabrielle King Morse Ex. Dir. 31 St. James St. Suite 520 Boston, MA 02116	501(C)(3) Charitable Organization	services at Greater Lawrence Technical School students	6,000.00
Youth Development Organization	Mark Kampert, Ex. Dir. 15 Union Street #563 Lawrence, MA 01840	501(C)(3) Charitable Organization	general operating & program support	55,000.00
Boston Baroque	Miguel Rodriguez, Executive Director 10 Guest Street - Suite 290 Boston, MA 02135	501(C)(3) Charitable Organization	Concerts at Essex Art Center in February 2020	7,000.00
After School Partners	Cindy Weiner, Exec. Dir., 342 A Boylston Street Newton, MA 02459	501(C)(3) Charitable Organization	Lawrence programming @ Esperanza Academy	10,000.00
Essex Art Center	John Budzyna, Ex. Dir. 56 Island Street Lawrence, MA 01840	501(C)(3) Charitable Organization	operating support	2 500.00
Mass Audubon Boston Nature Center	500 Walk Hill Street Malden, MA 02126	501(C)(3) Charitable Organization	general operating support	5 000.00
Gay Lesbian Advocates & Defenders	30 Winter St. - Suite 800 Boston, MA 02108	501(C)(3) Charitable Organization	general operating support	5,000.00
Boston Latin Academy, Friends of	205 Townsend Street Boston, MA 02125	501(C)(3) Charitable Organization	Boys Soccer team support	5 000.00
All Five	5 Reyna Place Menlo Park, CA 94025	501(C)(3) Charitable Organization	general operating support	500.00
Lake Sunapee Protective Association	Post Office 683 Sunapee, NH 03782	501(C)(3) Charitable Organization	general operating support	500.00
Latino STEM Alliance	20 Moraine Street Attn. Karen Chacon, Executive Director Boston, MA 02130	501(C)(3) Charitable Organization	programming Lawrence and Merrimack Valley	15 000.00
Bowdoin College	4100 College Station Brunswick, ME 04011-8432	501(C)(3) Charitable Organization	general operating support	1,500.00
My Life My Choice	989 Commonwealth Avenue Attn. Lisa Grace, Exec. Dir. Boston, MA 02215	501(C)(3) Charitable Organization	general operating support	1,500.00
British School & University-Oundle	575 Madison Ave., Suite 1006 New York, NY 10022-2511	501(C)(3) Charitable Organization	general operating support	1,000.00

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RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
American Cancer Society 30 Speen Street Framingham, MA 01701	501(C)(3) Charitable Organization	general operating support	250 00
Chatham Conservation Foundation 104 Crowell Road Chatham MA 02633	501(C)(3) Charitable Organization	general operating support	250 00
English Speaking Union 144 East 39th St New York NY 10016	501(C)(3) Charitable Organization	general operating support	100 00
TOTAL			1,312,871 00

**ABBOT & DOROTHY H. STEVENS FOUNDATION**

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**PART XV 3b GRANTS AND CONTRIBUTIONS APPROVED FOR FUTURE PAYMENT**

RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NORTHERN ESSEX COMMUNITY COLLEGE 100 ELLIOTT STREET HAVERHILL, MA 01830	501(C)(3) CHARITABLE ORGANIZATION	CAPITAL SUPPORT	200,000.00
PINGREE SCHOOL FOR PREP@PINGREE 537 HIGHLAND STREET SOUTH HAMILTON, MA 01982	501(C)(3) CHARITABLE ORGANIZATION	FOR LAWRENCE STUDENTS	30,000.00
ELEVATED THOUGHT FOUNDATION 22 HEATHER DRIVE METHUEN, MA 01844	501(C)(3) CHARITABLE ORGANIZATION	CAPACITY BUILDING	40,000.00
INSTITUTE FOR NON-PROFIT MANAGEMENT 51 SLEEPER STREET BOSTON, MA 02210	501(C)(3) CHARITABLE ORGANIZATION	ALUMNI PROGRAMMING AND FELLOWSHIPS	70,000.00
LAWRENCE COMMUNITY WORKS 168 NEWBURY STREET LAWRENCE, MA 01841	501(C)(3) CHARITABLE ORGANIZATION	GENERAL OPERATING SUPPORT	65,000.00
MERRIMACK RIVER WATERSHED COUNCIL 60 ISLAND STREET SUITE 211-E LAWRENCE, MA 01840	501(C)(3) CHARITABLE ORGANIZATION	ASSIST MRWC IN HIRING AN EXECUTIVE DIRECTOR	40,000.00

TOTAL

445,000.00